Exercise C. Change in statement of responsibility and main and added entries

Record updated:

```
100 1_ Stein, Joseph P., $d 1953-

245 10 Publishers of non-fiction articles $h [electronic resource]
: $b a database for writers / $c by Joseph P. Stein and Julia
Garcia.

500    Title from home page (viewed on Dec. 15, 2002).

500    Co-authored by Susan E. Morton <Jan. 22, 2001>

700 1_ Garcia, Julia M., $d 1961-

700 1_ Morton, Susan E., $d 1955-
```

The changes:

- Different statement of responsibility.
- Entails different main entry because new name is given first in the resource. Former added entry moved to main entry.
- Note on previous co-author, if considered important for description/identification.
- Former main entry moved to added entry if considered important for continued access.

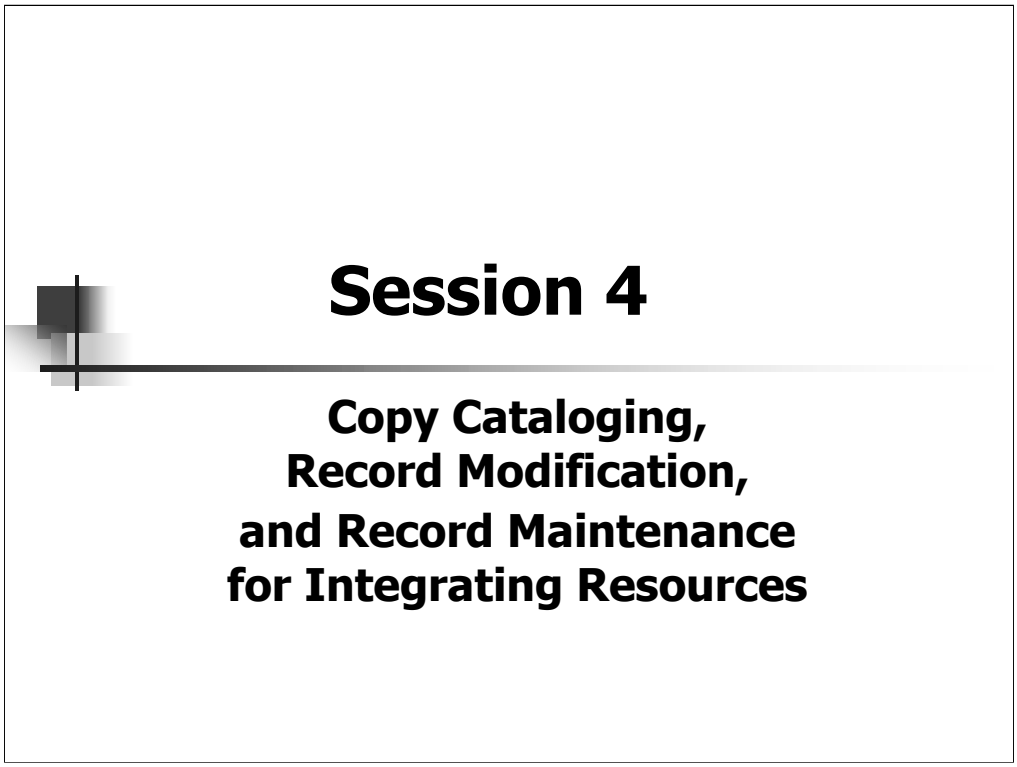
Optional Exercise D. Final iteration of updating loose-leaf

Record updated:

```
008    DtSt: m   Dates: 1989,2002
006    Freq: a   Regl: r   SrTp: l   S/L: 2
245 00 Guidelines for typewriting doctoral dissertations.
260    Ann Arbor, MI : $b University of Michigan Press,
       $c 1989-2002.
300    2 v. (loose-leaf) ; $c 28 cm.
310    Updated annually, $b 1997-2002
321    Updated semiannually, $b 1989-1996
```

The changes:

- The record is “closed off”
- Ending dates of publication are entered in 260 $c (because you have the final iteration) and 008 Dates fields.
- The number of volumes is entered in 300 $a
- The dimensions are changed to reflect the latest iteration.
- The range of dates applying to the last frequency of updates may be added.



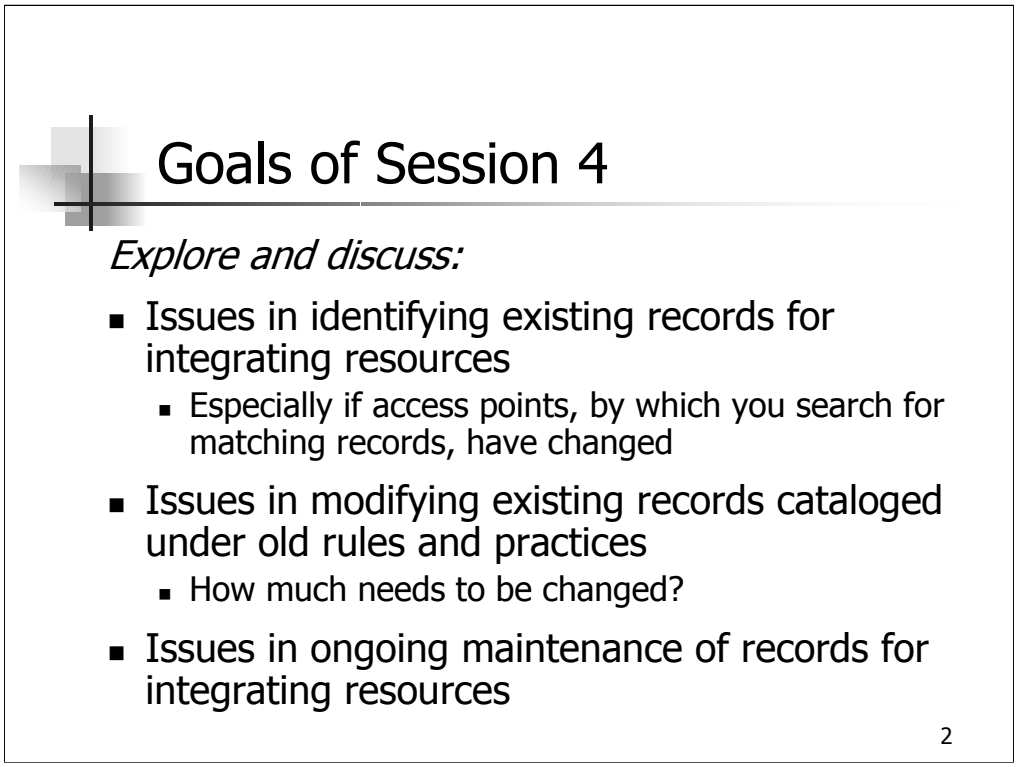
In this session we turn from the ideal way that cataloging and updating will be done under the new rules and turn to the 'real world' of records as they actually exist in current databases.

Optional Warm-up Exercises:

• This session will consist mostly of questions and issues for discussion, so instructors may wish to skip any warm-up exercises. If desired, however, the instructor might ask the participants: what issues are likely to come up when copy cataloging? What issues and problems in searching for existing records? In identifying the correct matching record for an integrating resource? What will need to be modified? When will a new record be needed for a resource?

Instructor References:

• None, but instructors may wish to peruse CONSER Cataloging Manual, 2002 ed., Module 21, by Bill Anderson as background for how that program deals with similar issues in the cooperative cataloging of serial resources.



The goals of the session are to explore the issues --through looking at some examples, but mostly through asking questions and through discussion of possible solutions.

• Catalogers of integrating resources, especially electronic integrating resources, may have more questions than answers right now.

• There is little if any definitive documentation to date on how these issues should be dealt with. This is hardly surprising. We are in the midst of the development right now, and perhaps all participants in these workshops can play a valuable role in expressing ideas, opinions, etc. for future guidelines and solutions.

• It should be well noted, however that:

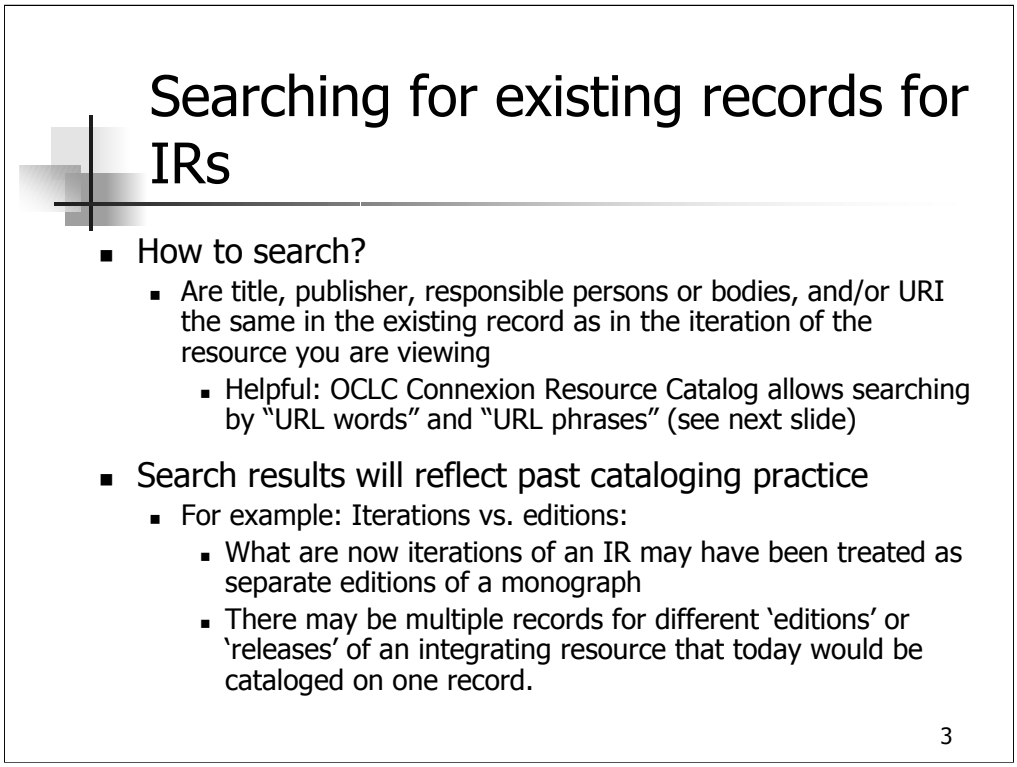
  • Many of these issues are the same as catalogers of Internet resource has been facing for the last decade or so, since cataloging these began under OCLC in 1994.

  • Many of them are definitely issues that catalogers of loose-leafs and serials have been facing for much longer.

• The serials cataloging community has developed policies and guidelines for many of these issues, evident, for example, in CONSER documentation. [See CONSER Cataloging Manual Module 21 by Bill Anderson, Library of Congress.]

Participants' Goals:

• You might ask the participants if they have any additional or more specific goals or areas that they especially want to discuss or learn about in this session.



• Besides searching multiple ways in the bibliographic utility, a cataloger on an online resource will want to search, in multiple ways if needed, via Internet search engines to find the resource itself, and will compare the resource as it now appears with what exists on any potential matching existing bibliographic records.

OCLC Connexion URL searching

From Connexion online HELP:

Limit search to URL index

•Two URL indexes are available: URL (phrase) and URL (word).

•**Select the URL (phrase) index when you want to find records that contain a URL exactly matching your search term.** Include as much of the URL as you know. You can include or omit *http://*. Enter the complete URL, beginning with *www.* (or other first segment) and all separator characters (. and /) to retrieve exact matches. If you are unsure of the parts following the domain name, type a single slash after the domain and then add an asterisk to match any URLs that begin with this domain. **Examples:** *http://www.noaa.gov/** or *http://www.uic.edu/**.

•**Select the URL (word) index to find records that contain URLs in which a particular word occurs.** Omit separator characters. Include only the significant word(s). **Examples:** *nasa* or *amazon* or *uic and lib*.

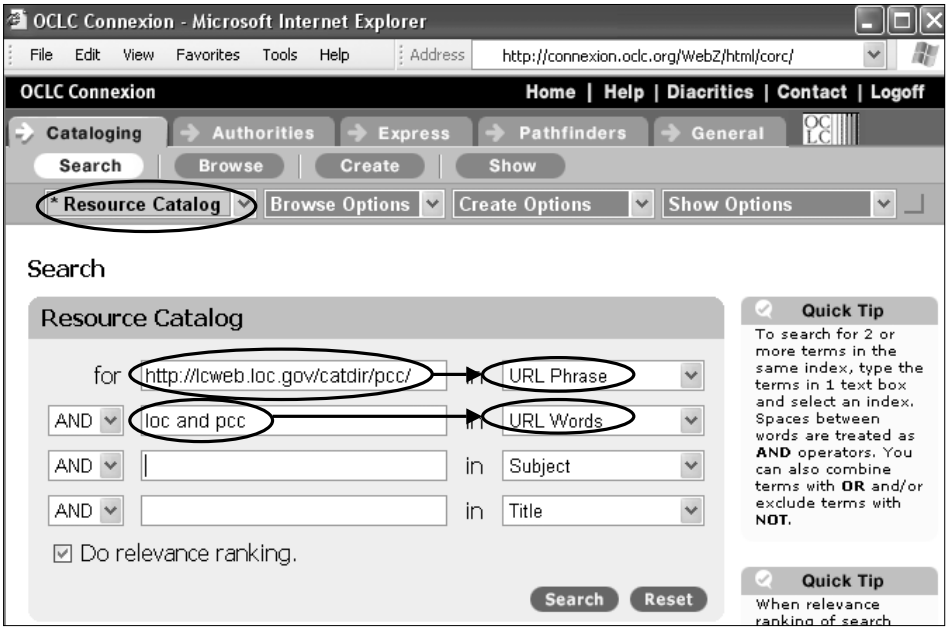
This slide is for reference purposes for those who use OCLC Connexion.

• The "Resource Catalog" is an alternative choice to WorldCat –it accesses the portion of WorldCat that migrated from the old CORC database –that is, records for Internet resources only.

• It has unique methods for searching, etc., not found in the regular WorldCat search interface within Connexion.

• The ability to search by parts or whole URIs is very valuable in cases where titles and name entries may have changed. It depends on what citation a cataloger is given by which to search.

OCLC Connexion URL searching



This slide illustrates graphically what was explained on the previous slide.

It may be of use to OCLC users for reference when they take their printed materials back to their institutions.

Search results in OCLC WorldCat:
Scholarly electronic publishing bibliography

8 records found by scan title search in WorldCat:

1. Scholarly Electronic Publishing Resources [electronic resource]. Electronic data. University of Houston Libraries, **2000-06-20**. [COMPUTER FILE] OCLC: 44480522

2. Bailey, Charles W. (Charles Wesley), 1950- Scholarly electronic publishing bibliography / Charles W. Bailey, Jr. **Version 2:11/15/96**. Houston, TX : University Libraries, University of Houston, **1996**. OCLC: 37697102

3. Bailey, Charles W. (Charles Wesley), 1950- Scholarly electronic publishing bibliography [electronic resource] / Charles W. Bailey, Jr. Electronic data [Houston] : University of Houston Libraries, **c1996-** [ELECTRONIC] OCLC: 35870002

4. Bailey, Charles W. (Charles Wesley), 1950- Scholarly electronic publishing bibliography / Charles W. Bailey, Jr. **Version 11:8/25/97**. [Houston] : University of Houston Libraries, **c1997**. OCLC: 37697302

5. Bailey, Charles W. (Charles Wesley), 1950- Scholarly electronic publishing bibliography / Charles W. Bailey, Jr. **Version 22:11/20/98**. [Houston] : University of Houston Libraries, **c1998**. [COMPUTER FILE] OCLC: 44377149

6. Bailey, Charles W. (Charles Wesley), 1950- Scholarly electronic publishing bibliography / Charles W. Bailey, Jr. **Version 16:2/19/98**. [Houston] : University of Houston Libraries, [c1998] OCLC: 38731132

7. Bailey, Charles W., 1950- Scholarly electronic publishing bibliography / Charles W. Bailey. **Version 39 : 10/24/2001**. Houston, Tex. : University of Houston Libraries, c2001. [**REPRODUCTION**] OCLC: 48992925

8. Bailey, Charles W., (Charles Wesley), 1950- Scholarly electronic publishing bibliography / Charles W. Bailey. **Version 41: 2/22/2002**. Houston : University of Houston Libraries, **2002**. [**REPRODUCTION**] OCLC: 49516825

A random example of the results of a search for an online integrating resource.

What to point out:

• Multiple records created for various versions of this bibliography –what are now considered different iterations of the same resource, to be accounted for on a single bibliographic record.

• Record 3 on the list appears to have been created as an "open" record for the entire resource, encompassing all future ongoing iterations, which is what we would do now.

- It looks to be a good candidate for use as a record to use for the integrating resource.

•There are also records created for reproductions of the bibliography. These may be locally-made hard copies, printed out from the Web pages by individual institutions, where the local printout is cataloged.

•Imagine if all 40+ existing iterations, and all future iterations, of this integrating bibliography, were to have a separate record created for it! And every institution created a separate record for its own local printed reproduction of various iterations!

This is a great illustration of why we have the new rules for cataloging these kinds of resources, and why the integrating entry cataloging convention makes so much more sense than creating new records for every version!

Search results in OCLC WorldCat:
USDA National Nutrient Database for Standard Reference

9 records found by scan title search in WorldCat:

1. USDA national nutrient database for standard reference. Beltsville, Md. : USDA, Nutrient Data Laboratory, Agricultural Research Service, [**SERIAL**] [ELECTRONIC] OCLC: 51231416

2. USDA national nutrient database for standard reference [electronic resource]. **Release 15**. Electronic data and program. Beltsville, Md. : USDA, Nutrient Data Laboratory, Agricultural Research Service, **[2002]-** [COMPUTER FILE] AGL OCLC: 50863495

3. USDA nutrient database for standard reference [electronic resource]. Riverdale, Md. : USDA, Nutrient Data Laboratory, Agricultural Research Service, **[1999-** [**SERIAL**] [ELECTRONIC] DLC OCLC: 435641

4. USDA Nutrient Database for Standard Reference [electronic resource]. **Release 12** [Riverdale, Md.] : Nutrient Data Laboratory, Agricultural Research Service, Beltsville Human Nutrition Research Center, **[1999]** [ELECTRONIC]: 41907546

5. USDA nutrient database for standard reference [electronic resource]. **Release 12**. Riverdale, Md. : USDA, Nutrient Data Laboratory, Agricultural Research Service, [1999] **1 computer optical disc ; 4 3/4 in.** [COMPUTER FILE]: 41315784

6. USDA nutrient database for standard reference [electronic resource]. **Release 13**. Beltsville, Md. : USDA, Nutrient Data Laboratory, Agricultural Research Service, 2000. **1 computer optical disc ; 4 3/4 in.** [COMPUTER FILE] OCLC: 44093926

7. USDA nutrient database for standard reference [electronic resource] / Nutrient Data Laboratory, Agricultural Research Service. **Release 14.** [Beltsville, Md.?] : The Laboratory, **[2001]** [ELECTRONIC] PCC OCLC: 49526685

8. USDA Nutrient Database for Standard Reference [electronic resource]. **Release 14**. [Riverdale, Md.] : Nutrient Data Laboratory, Agricultural Research Service, Beltsville Human Nutrition Research Center, **[2001]** [ELECTRONIC]: 48808234

9. USDA nutrient database for standard reference [electronic resource]. **Release 14**. Beltsville, Md. : Nutrient Data Laboratory, Beltsville Human Nurtition Research Center, Agricultural Research Service, [2002] **1 CD-ROM ; 4 3/4 in.** [COMPUTER FILE] PCC OCLC: 50048252

A similar example for one of our resources from Session 2.

Some of these are for the CD-ROM version; and this is as it should be: the online and CD-ROM versions should have separate records, which can now be linked via linking entries in each record.

One record for this database has been cataloged as a serial

```
 OCLC:  51231416
Type: a   ELvl: I   Srce: d   GPub:     Ctrl:    Lang: eng
BLvl: s   Form: s   Conf: 0   Freq: u   MRec:    Ctry: mdu
S/L:  0   Orig:     EntW:     Regl: u   ISSN:    Alph:
Desc: a   SrTp:     Cont:     DtSt: c   Dates: 2002,9999
006    m d
007    c ǂb r ǂd c ǂe n
245 00 USDA national nutrient database for standard reference ǂh
[electronic resource].
260    Beltsville, Md. : ǂb USDA, Nutrient Data Laboratory,
Agricultural Research Service,
362 1_ Electronic coverage as of 2002?
500    Description based on: Release 15 (2002); title from title
screen (viewed Dec. 16, 2002).
516    text/html
538    System requirements: Internet access; World Wide Web browser.
538    Mode of access: World Wide Web.
856 40 ǂu http://www.nal.usda.gov/fnic/cgi-bin/nut%5Fsearch.pl
```

Note that the database has been treated here as a serial.

Another record has been cataloged as a monograph for the latest release only

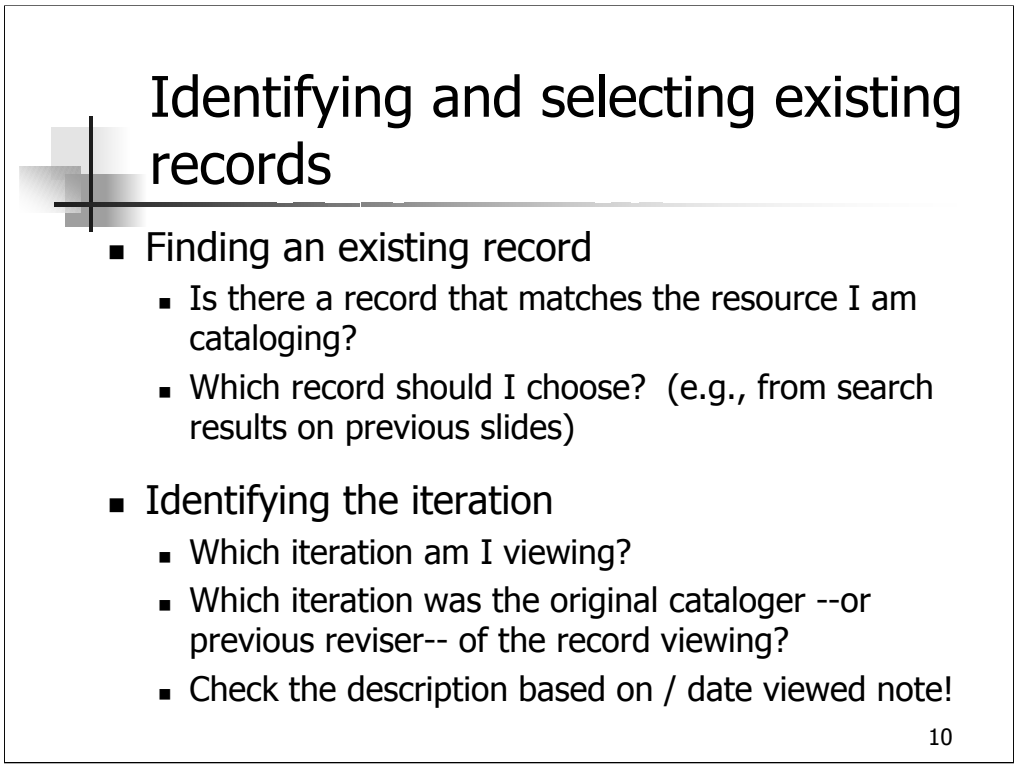
```
 OCLC:  50863495
Type: m   ELvl: I   Srce:     Audn:     Ctrl:     Lang: eng
BLvl: m   File: m   GPub: f   MRec:               Ctry: mdu
Desc: a                       DtSt: m   Dates: 2002,9999

007    c ǂb r ǂd m ǂe n
245 00 USDA national nutrient database for standard reference ǂh
[electronic resource].
246 1_ ǂi Title from HTML header: ǂa USDA nutrient database for
standard reference
250    Release 15.
256    Electronic data and program.
260    Beltsville, Md. : ǂb USDA, Nutrient Data Laboratory,
Agricultural Research Service, ǂc [2002]-
538    Mode of access: WWW browser; files also available for
download in DBF or ASCII text format.
500    Title from Web page (viewed on Oct. 25, 2002).
530    Also available on CD-ROM.
650 _0 Food ǂx Composition ǂv Databases.
856 40 ǂu http://www.nal.usda.gov/fnic/foodcomp/Data/SR15/sr15.html
```

In contrast to our ideal record from the end of Session 2, as this resource would be cataloged according to the new rules, this is the actual existing record the latest release (number 15) of the USDA National Nutrient Database for Standard Reference.

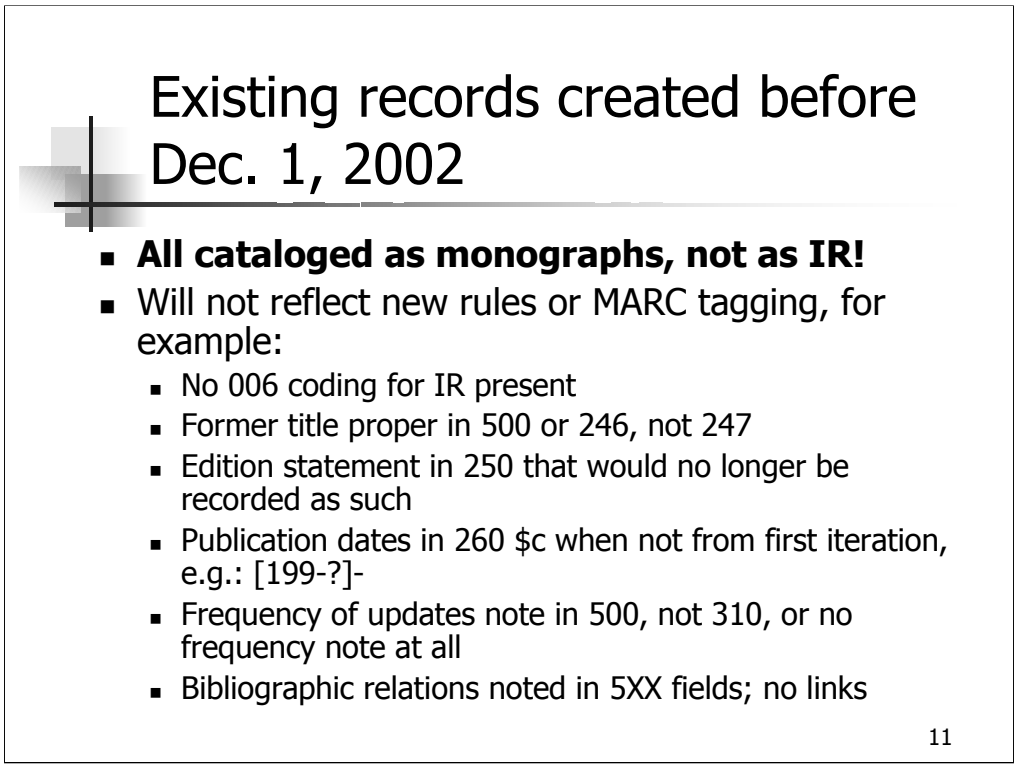
- It illustrates what we find in the real world when searching for an existing record.
- This record was very well done and cataloged correctly according to pre-2002 release rules.

We will come back to this example and to others shortly ahead in this session to look at the elements and what should or might be changed when copy cataloging.



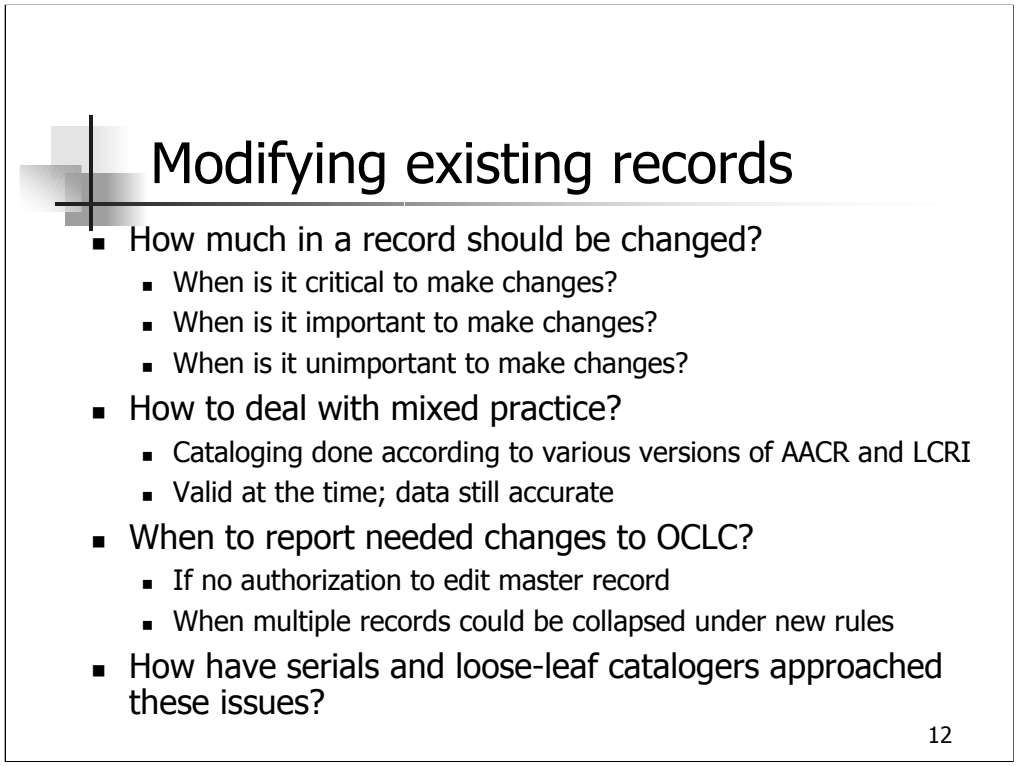
These are the questions. The answers will be as varied as the diverse situations that we will actually encounter.

In cases where a cataloger does identify an existing record for the resource selected for cataloging, one of the first things to do now will be to look for the date viewed / description based on note and compare it with the date on which the cataloger is viewing the resource.



This is what we will find as we begin with the new rules.

We will need to ask ourselves: which of these elements should we edit / modify in existing records and which not? Which are crucial? Which important? Which optional? Which trivial? --See the next slide.



One answer: **always add the new CR 006 with the new IR values, especially the Type of Continuing Resource element and the Entry Convention element**, whenever touching an existing record!

If you have authorization to modify master records, do so.

If not, follow local policies about making this change in your local system.

LC practice: when you have later iteration

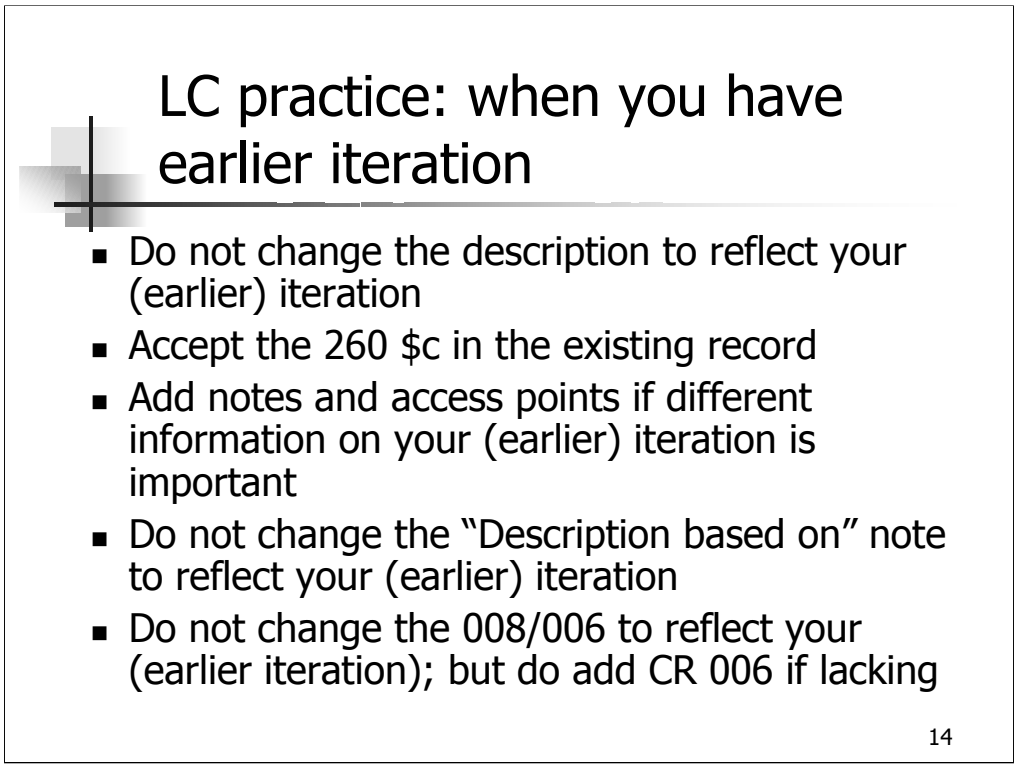
- Update the description and add access points to reflect the current iteration as needed
- Accept the 260 $c in the existing record
- Add notes and access points if different information on other library's earlier iteration is important
- Add or update the "Description based on" note to reflect the current iteration
- Update 008 and update/add CR 006 as needed

13

If LC's iteration is later, LC follows the steps on this slide.

• Accepting the 260 subfield $c in the other library's record is a change in LC practice.

This and the following slide have been borrowed from a presentation for LC catalogers by Judy Kuhagen and David Reser



If LC's iteration is earlier, LC follows these steps.

LC does not remove a 260 $c in the copy cataloging record.

Existing record for USDA National Nutrient Database

```
OCLC:  50863495
Type: m   ELvl: I   Srce:     Audn:     Ctrl:     Lang: eng
BLvl: m   File: m   GPub: f   MRec:               Ctry: mdu
Desc: a                       DtSt: m   Dates: 2002,9999

007    c ǂb r ǂd m ǂe n
245 00 USDA national nutrient database for standard reference ǂh
[electronic resource].
246 1_ ǂi Title from HTML header: ǂa USDA nutrient database for
standard reference
250    Release 15.
256    Electronic data and program.
260    Beltsville, Md. : ǂb USDA, Nutrient Data Laboratory,
Agricultural Research Service, ǂc [2002]-
538    Mode of access: WWW browser; files also available for
download in DBF or ASCII text format.
500    Title from Web page (viewed on Oct. 25, 2002).
530    Also available on CD-ROM.
650 _0 Food ǂx Composition ǂv Databases.
856 40 ǂu http://www.nal.usda.gov/fnic/foodcomp/Data/SR15/sr15.html
```

You might ask participants what issues they see entailed in how a cataloger could and should modify this record if copy cataloging today.

Issues, some major, some minor, include:

- BLvl = M (monograph); no 006 for CR present; not codes unique to IR
- Edition statement present for frequently changing release information; and this record was created to represent only Release 15; illustrates how we can now treat the database as an integrating resource using one record rather than a monograph using multiple separate records for each release: treat releases as iterations of the same work rather than as new editions / new works
- 256 is present, as it will be in tens of thousands of records: local decisions whether to retain or delete (LC retains if present on copy, does not add to originals)
- 530 note for other format available; no linking entry. Should one be added? If so, record for CD-ROM should also be edited to add the reciprocal link to this record.
- 856: shows that the URL is for Release 15: the selection of main page of entry to this database, as well as chief source of information, may need to be reconsidered.

Existing record for Scholarly Electronic Publishing Bibliography

```
 OCLC:  35870002
Type: a   ELvl: I   Srce: d   Audn:     Ctrl:     Lang: eng
BLvl: m   Form: s   Conf: 0   Biog:     MRec:     Ctry: txu
          Cont:     GPub:     LitF: 0   Indx: 0
Desc: a   Ills:     Fest: 0   DtSt: m   Dates: 1996,9999
006    m d
007    c ǂb r ǂd m ǂe n ǂf u
090    Z286.E43 ǂb B34 1996
100 1_ Bailey, Charles W. ǂq (Charles Wesley), ǂd 1950-
245 10 Scholarly electronic publishing bibliography ǂh [electronic
resource] / ǂc Charles W. Bailey, Jr.
256    Electronic data.
260    [Houston] : ǂb University of Houston Libraries, ǂc c1996-
538    Mode of access: Internet.
500    Title from title screen (viewed on Nov. 8, 1996).
500    Original edition statement: Version 1, 10-25-96; updated
irregularly.
856 40 ǂu http://info.lib.uh.edu/sepb/sepb.html ǂ3 HTML version
856 40 ǂu http://info.lib.uh.edu/sepb/sepb.pdf ǂ3 PDF version
```

This is a record wisely created for the bibliography as an ongoing resource, rather than for a particular version of this frequently changing online resource.

Note especially the 500 note on the editions statement.

This is a great example of how catalogers used their good judgment to in effect anticipate the current rules for IRs, and how the rules now codify what was good cataloging practice when following the rules literally was not.

Some of these practices were laid out in the 1980's in *Cataloging rules for the description of looseleaf publications* by Adele Hallam. Many of the practices outlined in Hallam's work were incorporated into chapter 12 rules for integrating resources in the 2002 revision.

Existing record for KnowThis.com

OCLC: 44281054

Type: a ELvl: 3 Srce: d Audn: Ctrl: Lang: eng
BLvl: m Form: s Conf: 0 Biog: MRec: Ctry: pau
Cont: GPub: LitF: 0 Indx: 0
Desc: a Ills: Fest: 0 DtSt: m Dates: 1998,9999

006 m d

007 c ǂb r ǂd c ǂe n ǂf u

245 00 KnowThis.com ǂh [electronic resource] : ǂb marketing virtual library.

246 1_ ǂi Title in HTML header: ǂa KnowThis.com : ǂb for market research, Internet marketing, advertising, selling & more

246 1_ ǂi Former title: ǂa KnowMarketing : ǂb the Internet's marketing virtual library

246 1_ ǂi Former HTML source title: ǂa TMVL, reference for marketing, selling, advertising, promotion, e-commerce

256 Electronic text data.

260 West Chester, Pa. : ǂb West Chester University, **ǂc c1998-**

538 Mode of access: World Wide Web.

500 Title from title screen **(viewed on Apr. 1, 2002).**

500 This site is part of the World Wide Web virtual library and is created and maintained by West Chester University.

500 Frequently updated.

856 40 ǂu http://www.knowthis.com

Here is another example of cataloging before the implementation of the new rules for IRs that incorporated into the record notes and access points for earlier forms of the title, and included a statement of "Frequently updated."

A cataloger could now change these 246s to 247s, but is this necessary? Important? Optional? Better left as is since was done correctly at the time and still provides access to the earlier forms of title?

What about publication date? The "viewed on" date shows that the record was not based on the first iteration. LC policy, as shown in previous slides, is to accept that date as is.

Another existing record, Encoding level K

OCLC: 44480522
Type: m **ELvl: K** Srce: d Audn: Ctrl: Lang: eng
BLvl: m File: d GPub: MRec: Ctry: xxu
Desc: **DtSt: e** **Dates: 2000,0620**
245 00 Scholarly Electronic Publishing Resources ǂh [electronic resource].
246 3_ Scholarly electronic publishing bibliography.
256 Electronic data.
260 ǂb University of Houston Libraries, ǂc 2000-06-20.
538 Mode of access: World Wide Web.
500 Title from title screen.
516 HTML text and graphics.
538 Mode of access: World Wide Web.
500 Description based on view on: 06-20-2000.
650 _0 Scholarly electronic publishing **ǂx Computer network resources.**
650 _0 Internet publishing ǂx Computer network resources.
650 _0 Libraries and electronic publishing ǂx Computer network resources.
650 _0 Electronic publishing ǂx Computer network resources.
710 2_ University of Houston. ǂb Libraries.
856 **ǂq text/html** ǂu http://info.lib.uh.edu/sepb/sepr.htm

This example is included because it illustrates a not uncommon type of record found for online resources in the OCLC database. (Encoding level K = Less- than full cataloging input by OCLC participating library)

Many of these kinds of records were originally created as Dublin Core records, not according to AACR2 standards, and mapped into MARC tagging. [DC records in MARC clothing.]

The WorldCat database is full of them, and they in many cases duplicate existing AACR2 records.

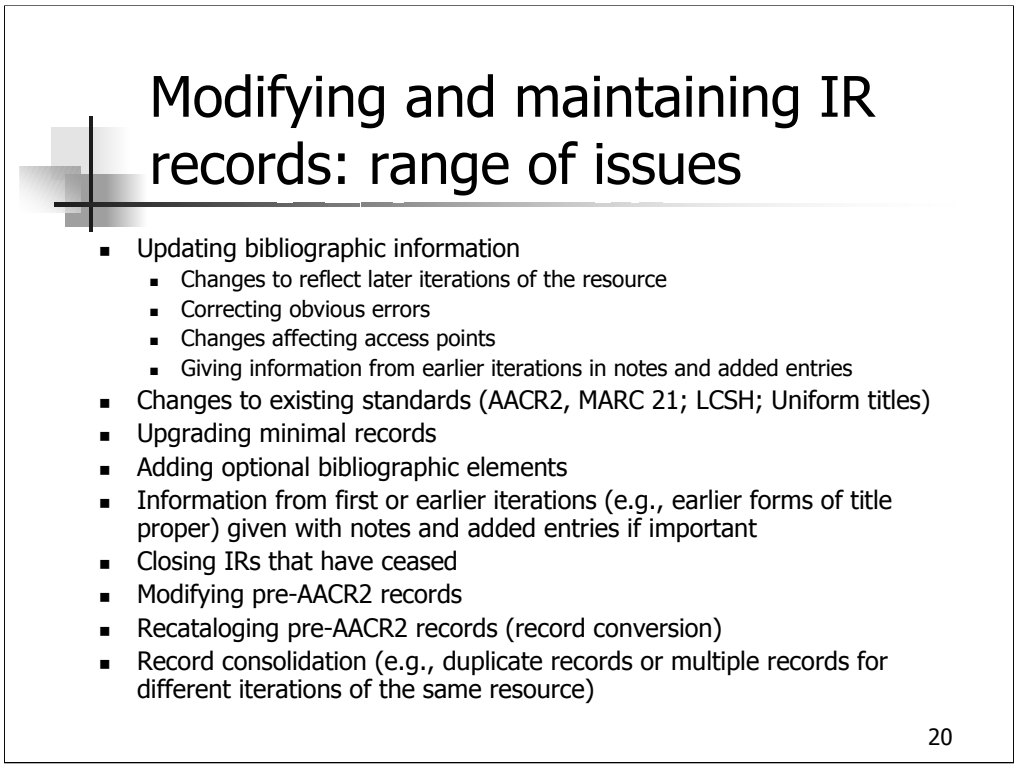
NetFirst record

```
 OCLC:  49844459
Type: a   ELvl: 3   Srce: d   Audn:     Ctrl:     Lang: eng
BLvl: m   Form: s   Conf: 0   Biog:     MRec:     Ctry: xx
          Cont:     GPub:     LitF: 0   Indx: 0
Desc:     Ills:     Fest: 0   DtSt: n   Dates: uuuu,uuuu
006     m u
040     N@F ǂc N@F ǂd OCLCQ
082 04  551.6
082 04  551.6
245 00  National Weather Service (NWS): Office of Climate, Water, and Weather
Services ǂh [electronic resource].
516     World Wide Web Resource
520 8_  The Office of Climate, Water, and Weather Services of the National
Weather Service (NWS) of the U.S. National Oceanic and Atmospheric
Administration (NOAA) is headquartered in Silver Spring, Maryland. The office
oversees delivery of hydrometeorological and climate services. The office
provides information about its products and data analysis services.
610 24  United States. Dept. of Commerce. National Weather Service. Office of
Climate, Water, and Weather Services.
650 _4  Meteorological services.
650 _4  Climate.
651 _4  Silver Spring (Md.)
651 _4  Maryland.
856 40  ǂu http://www.nws.noaa.gov/om/
```

The same holds true for those records originally created for the OCLC NetFirst project, a database of records for online resources outside of World Cat; the records were not created according to AACR2 standards but were all dumped into CORC and WorldCat, many duplicated good AACR2/MARC records for the same resource.

Notice the absence of a publication area (260 field) and various notes, etc. required by AACR2.

040 symbol N@F = NetFirst

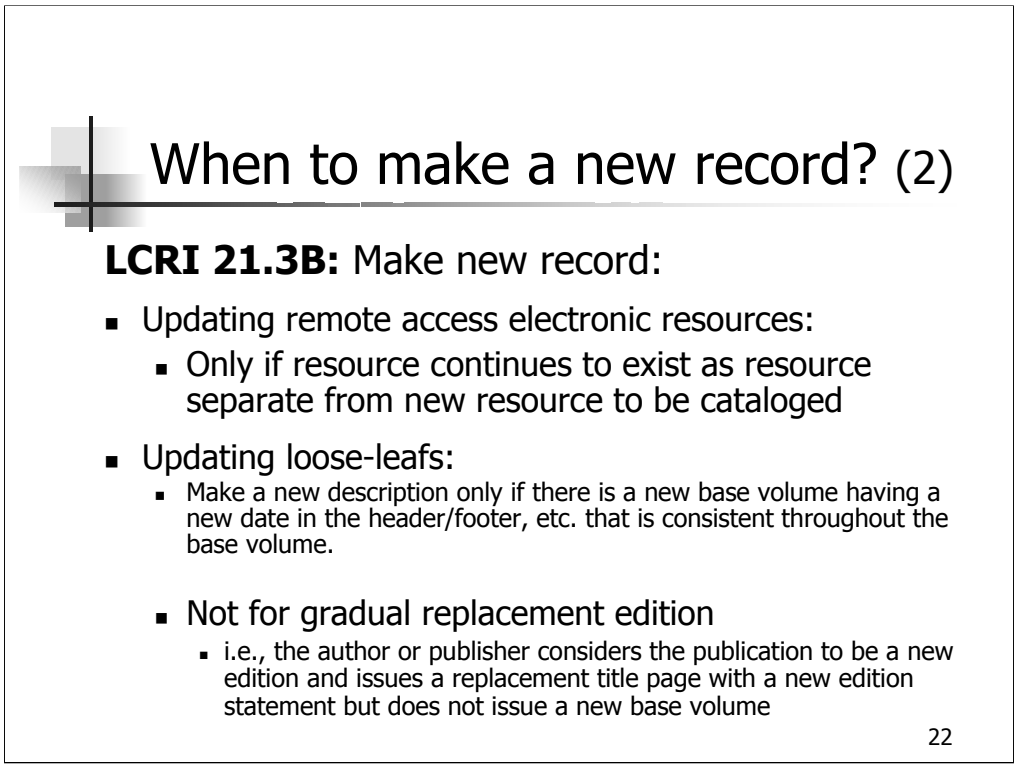


This list has been derived and adapted from Module 21 of the CONSER Cataloging Manual, 2002 ed.

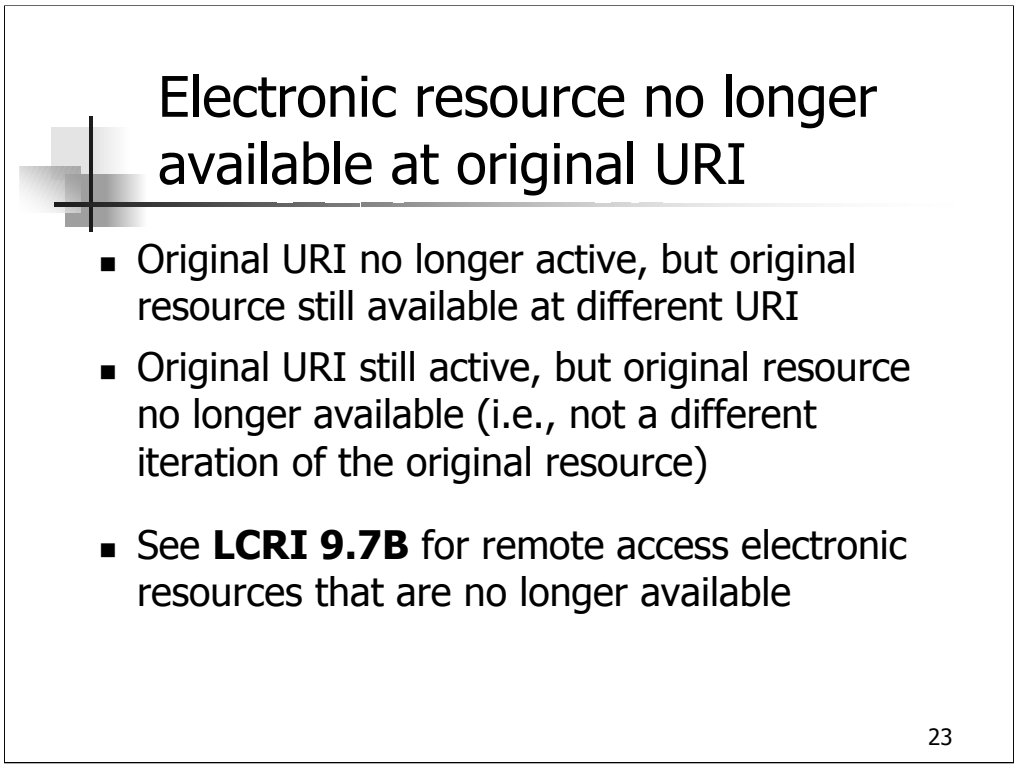
When to make a new record? (1)

- Very rarely! --That's the point of integrating entry
- General principle: make a new record when there is a new resource/work rather than another iteration of the same resource/work
- That is, when there is:
  - A new integrating resource
  - A merger of other resources (12.7B8b)
  - A split of an integrating resource into other resources (12.7B8c)
  - Original URI is still active but original resource is no longer available (LCRI 21.3B)

21



As of Apr. 30, 2003, **LCRI 21.3B,** is undergoing revision. The wording under "Updating loose-leafs" on the slide was supplied by CPSO, before the revised LCRI was released.



LCRI 9.7B covers two situations:

• Original URI is no longer active

• Original URI is active, but does not appear to link to the original resource

Original URI no longer active

- Use an Internet search engine to determine if the resource described in the record is now available at a different URI
- If found, update 856 $u in existing record
- If not found, LC practice:
  - Indicate in a note that the resource isn't findable (and the date you searched)
  - Include the reason, if known
  - Move the 856 $u to 856 $z
  - Suppress the bibliographic record from the OPAC

24

Different resource at old URI

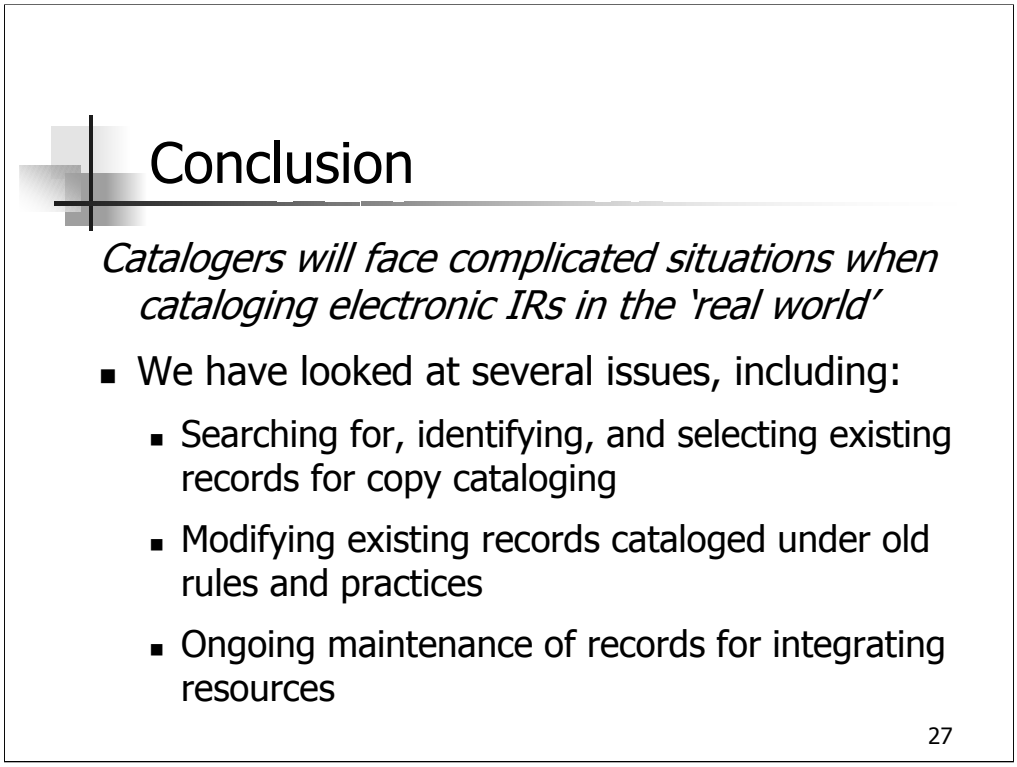
- Treat the existing bibliographic record as on previous slides, depending on whether no longer available or available at a different URI
- Create a new record for the new resource if selected for cataloging

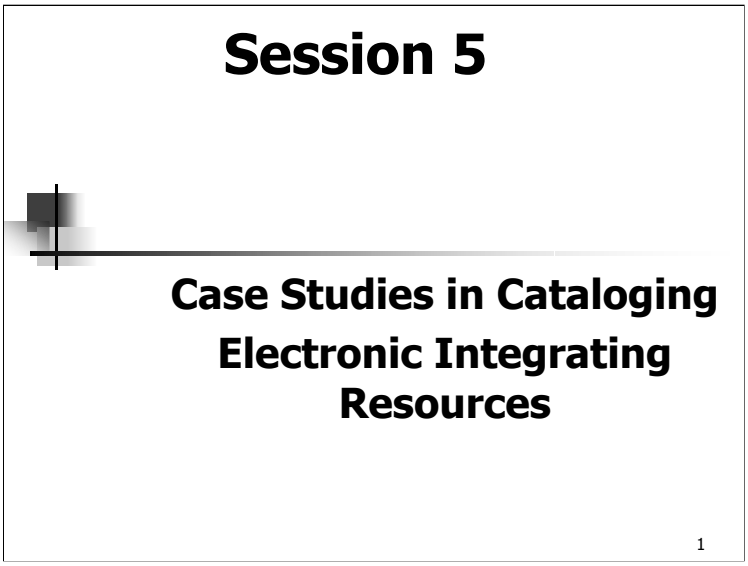
25

Ongoing maintenance questions

- **How to track changes?**
  - After cataloging is complete, how do you know when bibliographic elements in an online integrating resource have changed?
    - Serials and updating loose-leaves need to be checked in and new issues / iterations examined; changes can be spotted at that time; not so for remote access electronic resources
    - There are automated notification services for changes in URLs, but no way to automatically detect, for example, a change in title
- **Who will do it?**
  - Who will have authorization to update records (e.g. OCLC master records) for changes?
  - Will there be cooperative programs for record maintenance for IRs?

26


Conclusion
Catalogers will face complicated situations when cataloging electronic IRs in the 'real world'
We have looked at several issues, including:
Searching for, identifying, and selecting existing records for copy cataloging
Modifying existing records cataloged under old rules and practices
Ongoing maintenance of records for integrating resources
27



Participants will use the Session 5 Case Studies a different version of the exercise, without the answer in their manuals rather than from these PowerPoint slides.

Instructors A copy of the exercise document that the trainees have in their manual follows the instructors version of Session 5 (printouts of PowerPoint slides with answers). Instructors may wish to use the trainee version in addition to the PowerPoint slides.

- These pages printed from the slides include instructor notes.
- The actual slides may be used when going through the exercises together as a class, to have something projected on the screen
- Or instructors may wish to work entirely from the pages in the trainees' manuals.

Object of Session 5:

• The object of this session is to explore four topic areas of commonly challenging or problematic issues involved in the cataloging of electronic integrating resources. The session will focus on group discussion and exploration of these issues, either in small groups followed by large-group sharing, or by the whole class. There will not always be clear-cut right or wrong answers.

• The primary point here is really the **discussion** of the challenges involved in these examples, the various possibilities and what might be the better solutions. It will probably help participants to explain to them that the point of Session 5 it is <u>not</u> to be a test of anyone's knowledge or abilities; most of these examples are purposely difficult or ambiguous cases that could cause even the most experienced online resource cataloger to scratch her/his head and require some time and thought to figure out, and for which there may in many cases simply not be one single right or wrong answer!

Pacing this session:

• Depends on amount of time available, whether workshop is 1, 1½, or 2 days in length

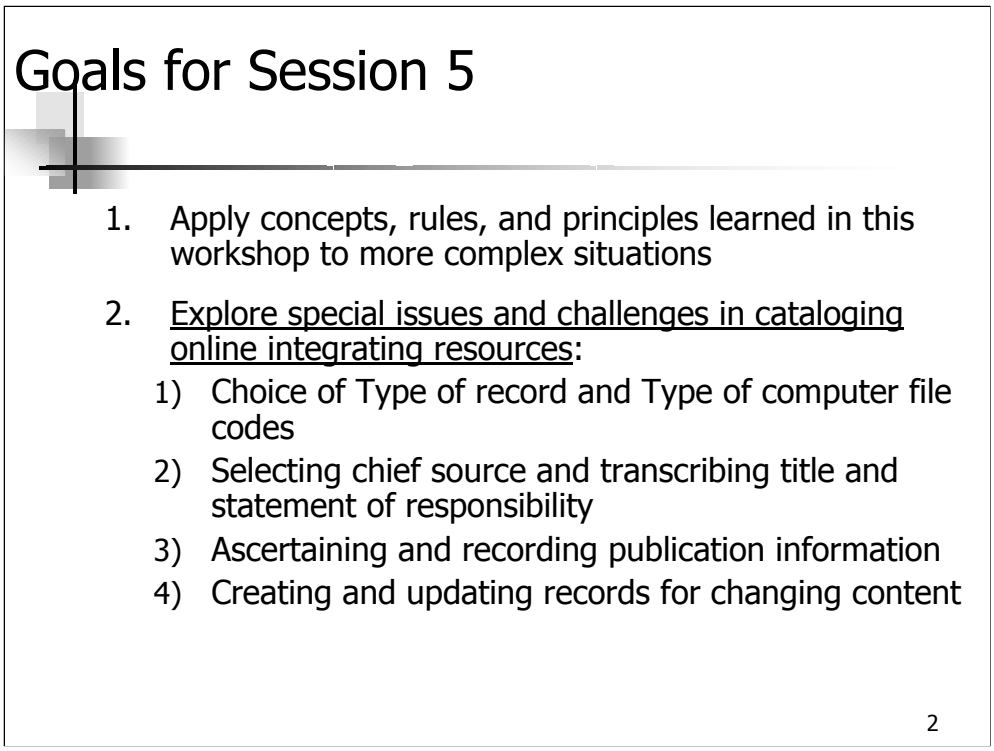
- You can have students work through the cases individually, in pairs, in small groups, and then come back for discussion among the whole group,
- Or work through the cases together with the whole and concentrate on group discussion

<u>Suggestions:</u>

• If there is sufficient time: let students chose to work individually or in groups of 2 or 3 according to their preferred learning styles

• Then have whole class go through exercises together; if enough time, individuals or groups could volunteer or be called on to share their answers

• If time is running short, the instructor can go through exercises together with the whole class all at the same time



Instructors are free to add, delete, edit, and/or substitute different examples and case studies.

Each Case study includes:

A particular topic to be explored and discussed

A set of questions for discussion of the issue

A set of screen shots of different resources or iterations of the same resource that illustrate the issues

Possible solutions with further discussion points

Additional issues for exploration might include (and could be added to future releases of these master materials):

- Ascertaining and recording frequency of updates
- When and how to create linking entry fields for relationships with other resources

---

Instructor References

The Instructor is advised to review and consult the following for this session:

- MARC Type of Record and Type of Computer File codes and their definitions in MARC 21 Format for Bibliographic Data and OCLC Bibliographic Formats and Standards.
- Interpretive notes on type of Record and Type of Computer File codes in Word document pages for this manual for Session 5 Case Studies.
- Guidelines for Coding Electronic Resources in Leader/06 / Library of Congress: http://lcweb.loc.gov/marc/ldr06guide.html
- Cataloging Electronic Resources: OCLC-MARC Coding Guidelines: http://www.oclc.org/oclc/cataloging/type.htm
- Use of Fixed Fields 006/007/008 and Leader Codes in CONSER Records: http://lcweb.loc.gov/acq/conser/ffuse.html
- Chapter 9 and 12 rules for chief source of information, area 1 (title and statement of responsibility), and area 4 (publication, etc.).

Case Study Topic #1

Choice of Type of Record ("Type" / OCLC workform) and Type of Computer File ("File") codes

Discussion questions:

1. What is the best choice of Type and File codes for each of the following resources based on the surrogates given (resources 1A-1G)?
   - Use the lists of codes and explanations given in appendix B.
2. When is it difficult to determine whether a Web resource is primarily textual/language material or primarily computer-based?

3

Instructor background:

- **MARC Type of Record (Leader/06 ; OCLC "Type")**
  - Since online integrating resources can contain almost any type of content, text, still or moving images, computer-based systems and services, etc., catalogers must select the Type of Record code that best characterizes the predominant or most significant content of the resource they are cataloging.
  - Type of Record code "m" for computer file is restricted to four specific categories of electronic resources:
    1. computer software (including programs, games, fonts)
    2. numeric data [when computer-manipulable]
    3. computer-oriented multimedia
    4. online systems or services
    - [Note: Code "m" was re-defined to this narrower scope in June, 1997; MARC records for Internet resources prior to that time may reflect different coding practices.]
  - If the resource does not fall into one of these four categories, it is cataloged using one of the other Type of Record codes that characterizes its most significant aspect.
  - In case of doubt, or if the most significant aspect cannot be determined, consider the item a computer file and use Type of Record code "m".
  - The most problematic areas tend to be in determination when a resource should be coded Type "a" vs. Type "m"
  - The following documents provide guidance in making coding decisions:
    - Guidelines for Coding Electronic Resources in Leader/06 / Library of Congress: http://lcweb.loc.gov/marc/ldr06guide.html
    - Cataloging Electronic Resources: OCLC-MARC Coding Guidelines: http://www.oclc.org/oclc/cataloging/type.htm
    - Use of Fixed Fields 006/007/008 and Leader Codes in CONSER Records: http://lcweb.loc.gov/acq/conser/ffuse.html
  - Note also that OCLC can change a master record if needed - contact OCLC quality control staff and they will make changes like type code changes when necessary.

Case Study Topic #1

Discussion questions, continued:

3. What constitutes "significant audio or video" that makes a Web site cross the invisible line from being text/language material to some other type for coding purposes?
4. What constitutes an "online system or service"?
5. What constitutes "interactive multimedia"?
6. When is numeric data text-based and when computer-based?
7. When should File code "m" be used?
8. How should we code databases of images, maps, or sound files as opposed to text?

4

Instructor background:

•MARC Type of Computer File (Computer File 008/26 and 006/09 ; OCLC "File")

•This element will always be included in MARC records for electronic resources, whether in the Computer Files 008 or 006.

•The determination of this value is made independently of the determination of the Type of Record value, although they are related.

- •For example, a resource that consists of numeric data will always be Type of Computer File code "a", but may be Type of Record code "a" or "m" depending on whether the data is presented in a static, textual, tabular way vs. a computer-manipulable way. In the first case it consists of data alone and in the second data + program(s).

•Codes that seem to present the most common problems for catalogers to determine when to use them, and which Type of Record code they may be used with:

- •d - Document
- •e - Bibliographic data
- •i - Interactive multimedia
- •j - Online system or service
- •m - Combination

•Web resources consisting mostly of HTML text with incidental images, hyperlinks, and/or search software are considered predominately textual and coded **Type "a"**.

- •[recall that a book with pictures is still cataloged as text, not as image material, as would a photograph or a poster]

•Note the restricted scope of **Type "m":** it applies now only to four categories of electronic resource.

•The determination of whether a Web resource should be Type "a" or "m" is not always as easy to determine as one would hope. The rules do say, if in doubt, consider it to be Type "m". This topic will be explored as the first case study issue in session 5a.

- **•See the additional guidelines in the Exercises-Session 5a Word document.**

•Instructors are urged to study the following two documents and the examples contained in them:

- •(1) Library of Congress: Guidelines for Coding Electronic Resources in Leader/06: http://lcweb.loc.gov/marc/ldr06guide.html
  - •Note especially the table of examples listed in Section 3 "Examples of types of electronic resources"
- •(2) Cataloging Electronic Resources: OCLC-MARC Coding Guidelines by Jay Weitz: http://www.oclc.org/connexion/documentation/type.htm

Resource 1A

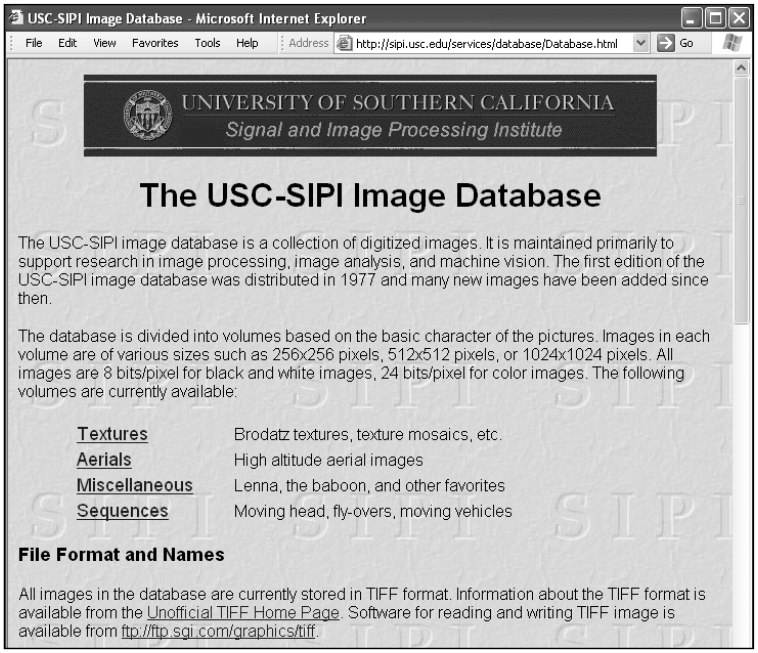
5

•**Type: e – cartographic material**

•**File: c – representational**

This resource is an online atlas. Although it contains a great deal of text and other images, its primary content is cartographic. The specific type of electronic resource, when selecting from the list of codes for the Type of computer files element, is representational, since the maps are representational images.

Resource 1B



6

•Type: k – two-dimensional nonprojectable graphic, i.e., image data

•File: c - representational

This resource is a database of digital images. As such, its primary content is representational, image data

Resource 1C

7

•Type: j – musical sound recording

•File: h - sound

This resource is a database of digital sound files, and from the screen shot we can see that it consists of music rather than spoken nonmusical sound recording material.

Resource 1D

•Type: a (language material) or m (electronic resource / computer file)**?**

•File: d (document) or m (combination) or j (online service)**?**

Notes for Instructor:

•This resource is a Web site that provides access to the Internal Revenue Service, PDF versions of tax forms, textual information about the services and tax information, tax statistics, but also links to information about careers with the IRS with interactive job search capabilities, current information about tax scams and fraud alerts, links to sites for electronic tax filing.

•This resource seems to entail more than just language material, seems to be more than simply a collection of textual documents. **Type** is best taken as either "**a**" or "**m**" rather than "a" --if in doubt as to which is best, choose m, per the guidelines.

•For the **File** code, is it best regarded as an "online service" or as a "combination" of multiple types (document, numeric data, programs, etc.? Either choice could be justified.

Resource 1E

9

•Type: a (language material) or m (electronic resource / computer file)**?**

•File: d (document) or m (combination)

Notes for Instructor:

•This resource is a Web site that constitutes LC's "virtual presence" on the Web. It includes information about the Library, contains links to its online catalog, many online exhibitions and digital collections of text, images, sound files, maps, etc., a featured Web cast, an online gift shop with interactive online shopping capabilities, etc.

•**Type** code "**m**" is the better choice for this Web site than 'a" since it includes so much more than simply text.

•**File** code "m" would certainly be appropriate.

Resource 1F

10

•Type: a (language material) or m (electronic resource / computer file)?

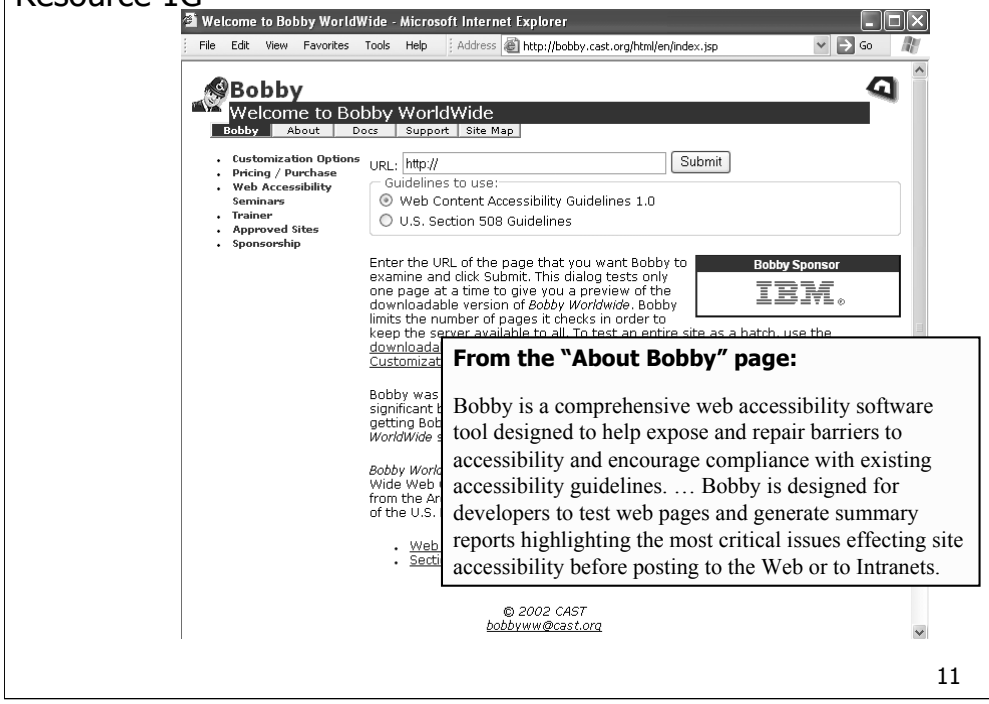
•File: d (document) or m (combination) or "e" (bibliographic data)?

Notes for Instructor:

•It may not be apparent from the home page alone, but this Web site is actually a collection of Web "portal pages" that consist of links to other resources. It does not actually contain content within this domain name aside from textual hyperlinks to other Web sites. It is therefore **Type "a", language material**, and not Type "m".

•The Type of computer file code might conceivably be taken as "e", bibliographic data, since one might think of this as a set of citations, but this is probably stretching the intended definition of citations and bibliographic data. **File code "d" for document** is the better choice, since the resource consists of textual links. Or file code **"z" for Other** might also be a legitimate choice in this case. Otherwise File code "u" for Unknown could always be possible.

Resource 1G



- **Type: m - electronic resource / computer file**
- **File: b – computer program**

This resource is a Web resource that functions primarily as a computer program that tests Web pages for correct HTML and other formatting. The user submits the URL for a Web page and the program returns a set of results.

Case Study Topic #2

Selecting chief source of information and transcribing title and statement of responsibility

Discussion questions:

1. What is the best choice for chief source of information and title proper for each of the resources below (2A-2E)?
2. What would you have in your bibliographic record for:
   - 245 title and statement of responsibility
   - 246 variant forms of title
   - 500 source of title note

12

Case Study Topic #2

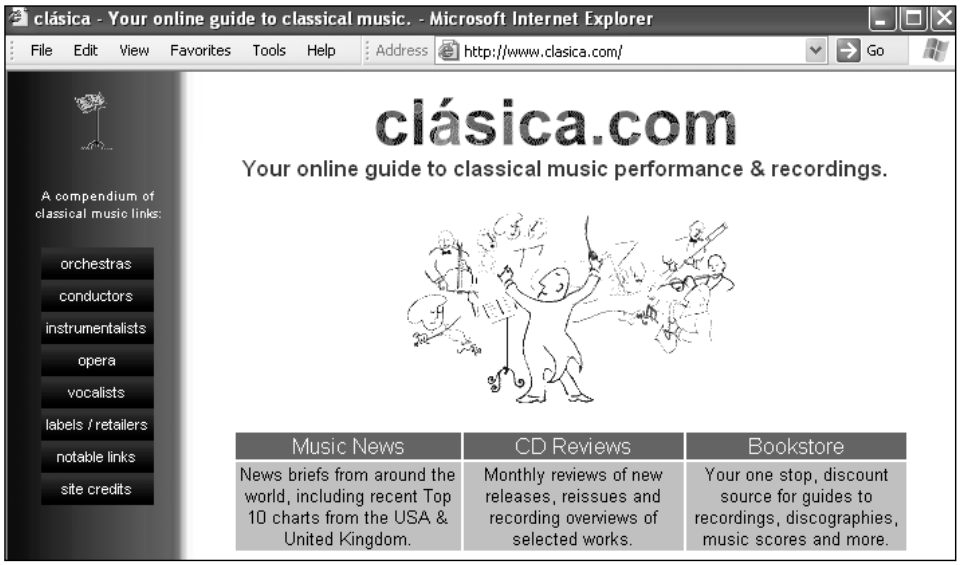
Discussion questions, continued:

3. Taking into account the changing nature of integrating resources, when might catalogers choose not to transcribe other title information after the title proper?

4. Are there cases in which an institution name that appears as a graphic or logo should be transcribed as a statement of responsibility if not taken as title proper?

13

Resource 2A



14

Options:

•245 00 Clásica.com $h [electronic resource].

•500 Title from home page. [or other wording]

•245 00 Clásica.com $h [electronic resource] : $b your online guide to classical music performance & recordings.

•500 Title from home page. [or other wording]

•245 00 Clásica $h [electronic resource].

•500 Title from HTML header. [or other wording]

•245 00 Clásica $h [electronic resource] : $b your online guide to classical music.

•500 Title from HTML header. [or other wording]

•246s for Clásica and Clásica.com

•Optional: 246s for title proper + subtitle combinations, including possibly spelling out ampersand in subtitle on home page title display.

No one absolutely correct or incorrect answer. But since the title display at the top of the home page presents a "fuller source," it should probably be preferred as the 245 title proper, and the subtitle appears in one variation or another in both common source of information, it would best be transcribed in the 245 and 246 rather than omitted or covered by a 500 note.

Thus probably the best choice would be:

•245 00 Clásica.com $h [electronic resource] : $b your online guide to classical music performance & recordings.

•246 1_ $i Title from HTML header: $a Clásica : $b your online guide to classical music

•500 Title from home page. [or other wording]

Resource 2B

15

Three options for title proper:

•The INS online

•Immigration and Naturalization Service

•USINS Internet home page

Best choice: both "The INS online" or "USINS Internet home page" appear to be intended as formal titles. Either choice is fine for the 245 title proper, with the other given in a 246.

Also consider giving a 246 for "Immigration and Naturalization Service"

This might also be transcribed as a statement of responsibility, and could be taken as part of the formal title display on the home page and recorded like this:

•245 04 The INS online $h [electronic resource] / $c Immigration and Naturalization Service.

•The question of whether or not the corporate body should also be a main entry is a separate questions not dealt with in this study.

Resource 2C (screen shot 1)

16

Why is this is a more challenging instance? The following rules from AACR2 are for instructor background:

1.1B8:

If the chief source of information bears titles in two or more languages or scripts, transcribe as the title proper the one in the language or script of the main written, spoken, or sung content of the item. If this criterion is not applicable, choose the title proper by reference to the order of titles on, or the layout of, the chief source of information. Record the other titles as parallel titles (see 1.1D).

1.1D2. *[Note: LC uses second-level description]*

In preparing a second-level description (see 1.0D2), give the first parallel title. Give any subsequent parallel title that is in English.

Wood Cree [GMD] = Les Cris des forêts

Einführung in die Blutmorphologie [GMD] = Introduction to the morphology of blood

Strassenkarte der Schweiz [GMD] = Carte routière de la Suisse = Road map of Switzerland

If, in preparing a second-level description, all of the following conditions apply:

a) the title proper is in a nonroman script

b) the first parallel title recorded in accordance with the instructions in the preceding paragraph is in a nonroman script

c) no title is in English

give as the second parallel title the one that is (in order of preference) in French, German, Spanish, Latin, any other roman alphabet language.

In preparing a third-level description (see 1.0D3), transcribe all parallel titles appearing in the chief source of information according to the instructions in 1.1B.

Wood Cree [GMD] = Les Cris des forêts

Einführung in die Blutmorphologie [GMD] = Introduction to the morphology of blood = Ddtltybt d vjhajkjub. rhjdb

Strassenkarte der Schweiz [GMD] = Carte routière de la Suisse = Carta stradale della Svizzera = Road map of Switzerland

Resource 2C (screen shot 2) http://www.un.org

The title in the title screen appears only when the user holds their cursor over the word "Welcome"; parallel titles in the other languages appears when the cursor is held over the other greetings.

17

Note: the URL at the top of the slide will function as a live hyperlink to this Web site if you have a live Internet connection.

Resource 2C (screen shot 3)

18

• **The intention here is to catalog the entire site at the highest level, including all language variants, not just the English version.**

• Ask participants what are the possible titles/subtitles for the 245? They include:

- •Welcome to the UN : it's your world
- •UN : it's your world
- •United Nations : it's your world
- •Welcome to the United Nations
- •United Nations
- •United Nations home page

• Because of the multilingual complexity of the site, it may be virtually impossible to follow AACR2 1.1B8 and 1.1D2 for selecting the language of the title proper and two parallel titles for transcription. It may therefore be best to transcribe the title information from the HTML header (English) and explain the nature of the site and its initial screens in a note, including a 546 language note.

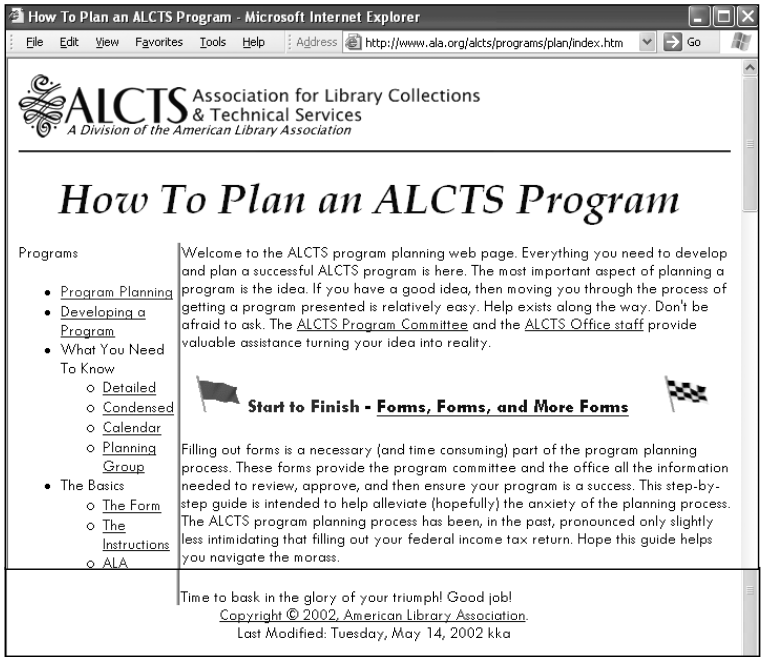
• We also have the complication of "Welcome to" in two versions of the title, this text string should be omitted per AACR2 1.1B1

• The HTML header title that is the one fixed constant, regardless of cursor position or selecting a specific language, but without the "Welcome to" phrase it consists of an primarily of acronym. Given all of this, perhaps the best choice for title proper is the fullest form of title found in English:

- •245 00 United Nations home page $h [electronic resource].
- •246 3_ United Nations
- •246 1_ $i Title in HTML header of home page: $a Welcome to the UN : $b it's your world
- •246 3_ Welcome to the United Nations

• We can also ask whether we might be being too overly concerned as catalogers about getting the "right" title proper or placing too much of an emphasis on transcription of every variation that appears. It seems that the creators of the site were not terribly concerned with presenting one uniform "title proper" for the Web site. How likely is it that users will search for the resource using some of these variations? How might this differ from the typical "known item search" for a title of a book? Possible suggestion: might users who do not know the Web site be most likely to search by the phrase "United Nations" over most other possibilities? If this might be so, to what extent can a cataloger take this into consideration when choosing what form of title to record in 245 $a?

Resource 2D



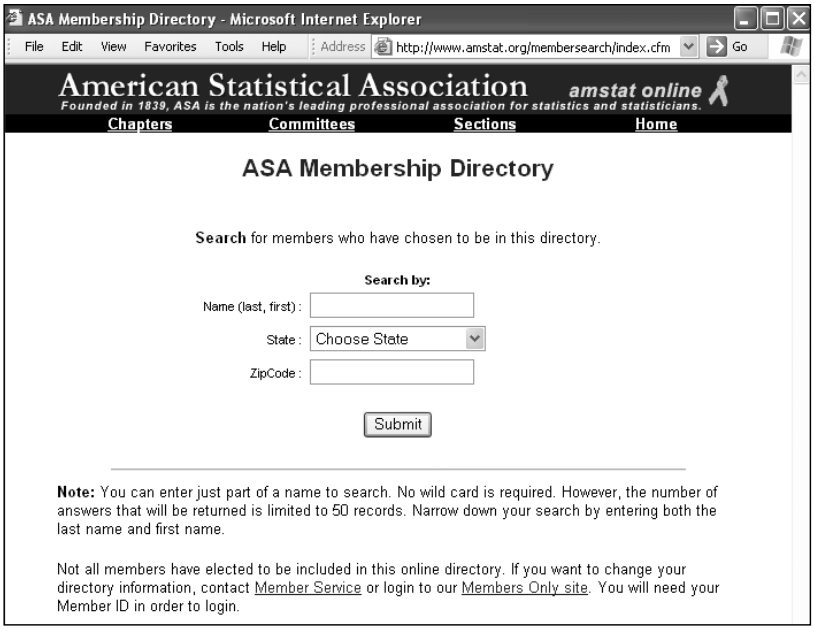
19

The title proper here is clear, based on both the page title display and the HTML header. Here, some catalogers might question whether or not to transcribe the name of the corporate body as a statement of responsibility when it appears as a graphical logo at the top of the home page.

Since the title proper has been determined, the name of the organization in this case should not be taken as a title or title variant; it could be transcribed as a statement of responsibility, as follows:

•245 00 How to plan an ALCTS program $h [electronic resource] / $c Association for Library Collections & Technical Services.

Resource 2E



20

The possibilities for the 245 title and statement of responsibility this resource include:

•245 10 ASA membership directory $h [electronic resource].

•245 10 ASA membership directory $h [electronic resource] / $c American Statistical Association.

•Note also:

- •"Amstat online" is the name of the larger Web site of which this directory is one sub-section (level of granularity)

Case Study Topic #3

Ascertaining and recording publisher, place, and dates of publication

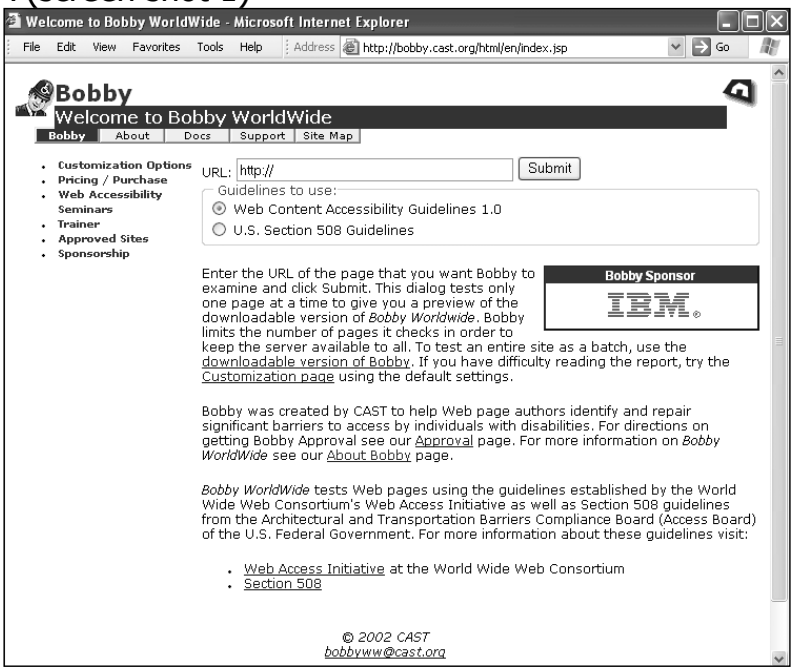
Discussion questions:

1. What is the place of publication and publisher name for each of the following two resources (3A-B)?
2. What are the dates of publication of each?
3. What would you give in a MARC record for fields 260 and, if applicable, 362 1, for these resources?
4. Is "hosting" a Web site the same thing as "publishing" it?

21

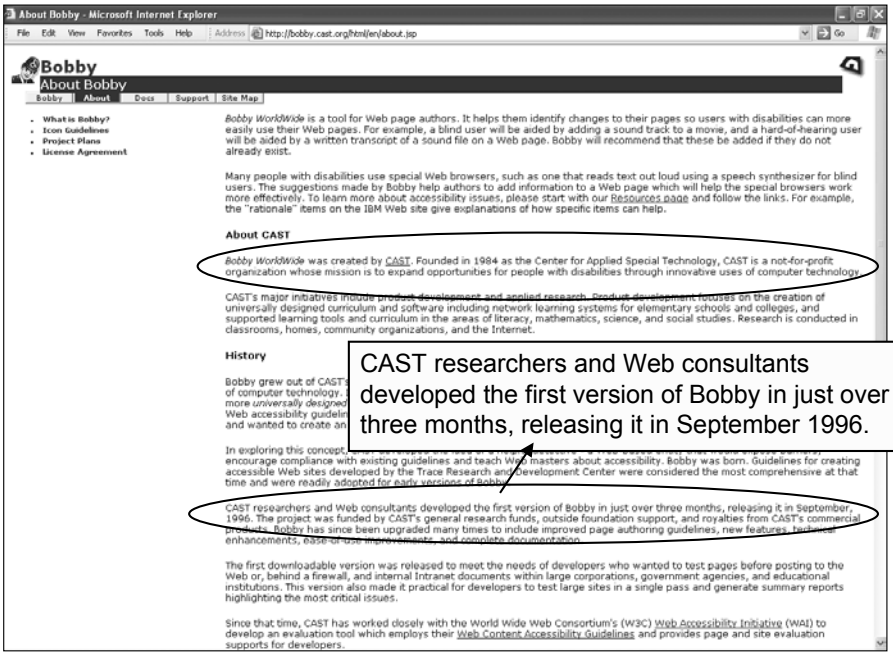
Hosting: consider the level of involvement of the host before thinking it is the publisher. Don't guess at a publisher or base solely on URL without a statement. If not ascertainable, use "[s.n.]".

Resource 3A (screen shot 1)



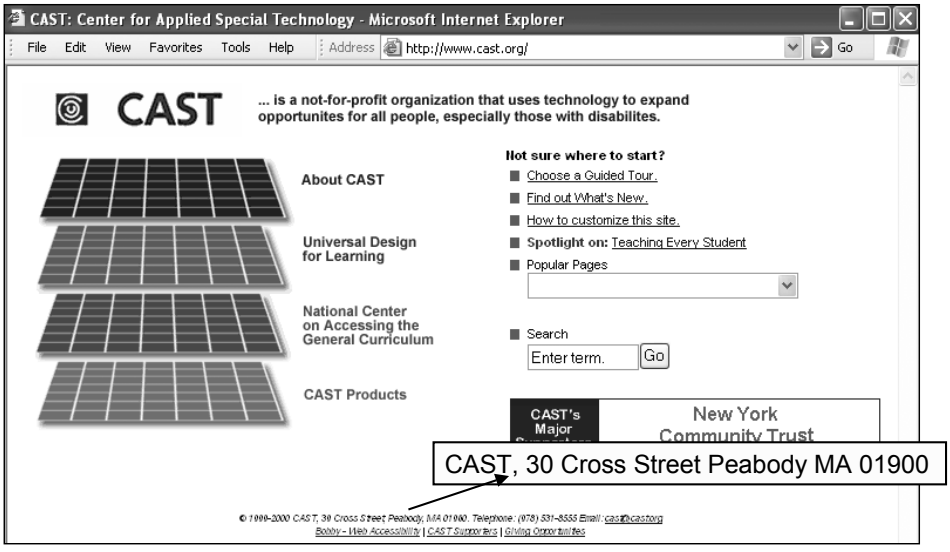
22

Resource 3A (screen shot 2)



23

Resource 3A (screen shot 3)



24

Possibilities include:

- 260 [Peabody, MA] : $b CAST, $c [1996]- ← *suggested best choice*

- 260 [Peabody, MA] : $b CAST
- 362 1_ Began in 1996.

- 260 [Peabody, MA] : $b CAST
- 362 1_ Began in 1996?

Since the place of publication is taken from a source outside of the resource being cataloged (i.e., the CAST Web site, not the Bobby Web site), it must be given in brackets.

The copyright date of 2002 on the Bobby home page cannot be taken as either the beginning or ending date of this resource, and the range of copyright dates on the separate CAST page would normally be taken to refer to the CAST.org Web site and not the Bobby Web site.

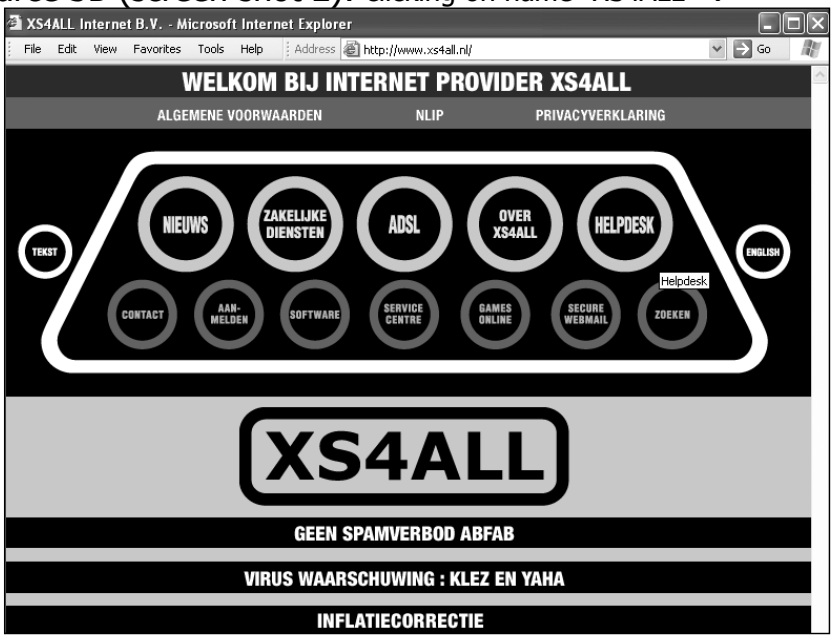
But the "About Bobby" gives a statement that the first version of Bobby was released in 1996. This may be taken as an "explicit statement" of the beginning date, or might leave enough ambiguity that one might not take it as an explicit statement of the year that Bobby was first published online.

If this date is taken as an explicit statement of the beginning date, it must be entered in brackets in the 260 $c because you are not cataloging from the first iteration of the Web site.

Resource 3B (screen shot 1): www.python.org hosted by XS4ALL

25

Resource 3B (screen shot 2): clicking on name "XS4ALL" →



26

Resource 3B (screen shot 3): no other publisher information beyond:

27

In this case is the "host" of the Python Web site the same as it publisher? Is Python.org the publisher?

Or is there no stated publisher name and so best to give "Hosted by XS4ALL" as a distributor statement in the absence of a publisher?

Possibilities include, but may not be limited to:

260 [S.l.] : $b Python

260 [S.l.] : $b Python.org

260 [S.l. : $b s.n.] ← *possible best choice*

260 [Netherlands] : $b Hosted by XS4ALL ← *possible best choice*

Note: even without further investigation and evidence, the ".nl" country code top-level domains in the URL domain shows that the XS4ALL Web site is located in the Netherlands

362 1 Began between early 1990s and 2003. ← *some note along these lines if a note is given*

362 1 Began after the early 1990s and before 2003.

362 1 Began in 1990s?

For beginning date the best we can do is a very approximate range since nothing is explicitly stated and there is no other information to go on. The site probably started sometime in the 1990s, but could have begun in the early 2000s, even conceivably as late as 2002. Without further information we just don't know.

• Remember also that the cataloger also has the perfectly legitimate option of not giving a dates of publication note at all if there is no information present in the resources. It is up to individual cataloger judgment as to whether the kind of general information given above is thought potentially useful to other catalogers

Case Study Topic #4A

Creating and updating records for changing content

Discussion questions for Resource 4A:

1. How would you record the title proper and other title information for each iteration of the Mapquest Web site represented on the following slides?
2. Would knowing the frequency of changes for this title and other title information influence how you transcribe the title proper and especially other title information?
3. At what point might you use a 547 title complexity note instead of multiple 247s?

28

Resource 4A, Jan. 11, 1998:

29

Participants can jot down on paper, if time, the 245, 246, and 500 source of title note for each of these selected iterations and compare them with one another.

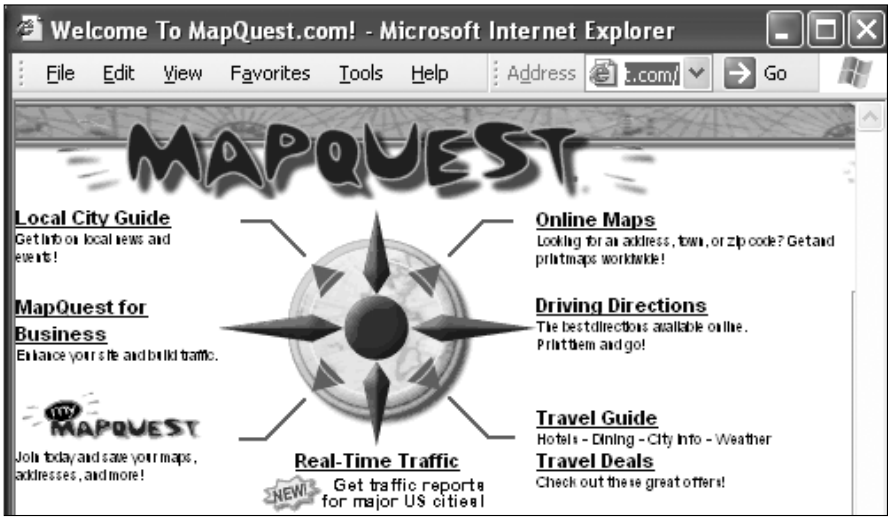
Note in each screen shot:

•Title display on home page

•Title in HTML header / browser title bar

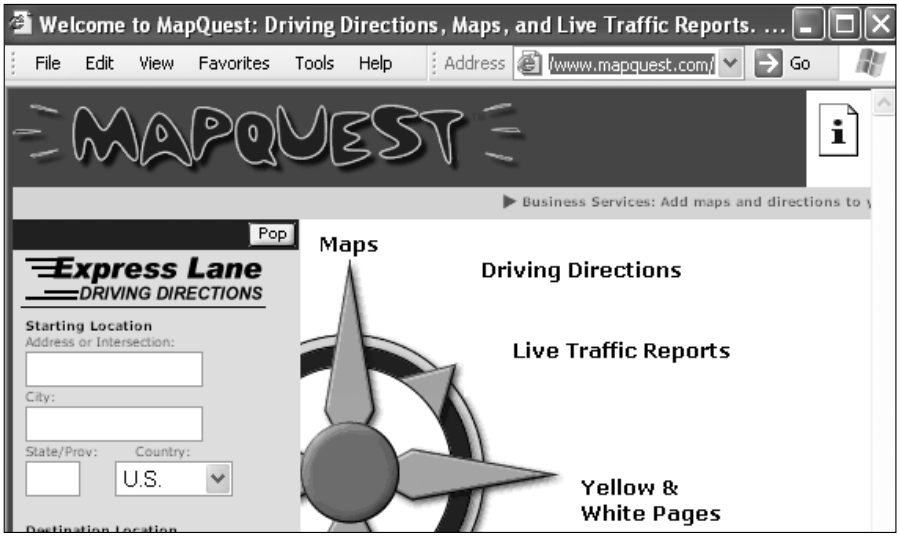
•Possible subtitles in both in addition to titles proper

Resource 4A, Nov. 10, 1999:



30

Resource 4A, May 10, 2000:

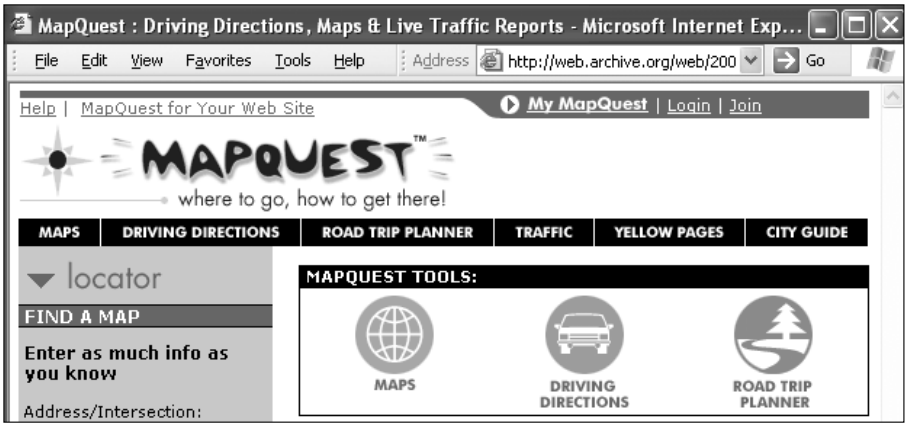


31

Resource 4A, Oct. 1, 2000:

32

Resource 4A, Oct. 12, 2000:



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Discussion points include the questions on the two initial slides for this topic.

We observe many changes and variations in the subtitles (other title information) for this Web site over time, and what we have are only random samples; there are probably more.

There is one constant throughout all the variations: the name MapQuest. In almost all iterations included here it would be taken as the title proper. The only other alterative might be to take "Mapquest.com" as the title proper for the 11/10/1999 iteration, if considered a "fuller form". But the constant prominence on the home page screen of the title "Mapquest" could indicate that it is the best choice for title proper.

There are basically three possibilities for handling this situation, with some variants on each:

1. Do not transcribe any instances of other title information. Exercise the cataloger prerogative stated in 12.1E to omit it if not considered important. Knowing that this information is continually changing would be a good reason to omit it from the Title and statement of responsibility transcription.
2. Transcribe the current other title information in the Title and statement of responsibility area (245 $b) and record former subtitles in 246 fields. If choosing this option, how many would you record? All known instances? All instances that had been transcribed in previous iterations of the bibliographic record?
3. Note the changing subtitle information in a 500 note. This could be something as generic as "Subtitle varies." or include a list of some of the variants, perhaps as quoted notes.

Resource 4A, Aug. 10, 2002:

34

Possible suggestion:

245 00 MapQuest $h [electronic resource].

500 Title from home page (viewed Aug. 10, 2002).

500 Subtitle varies.

520 [include key words and phrases included in some former subtitles, such as driving directions, maps, traffic reports, etc.]

6XX [also include some of those terms in subject headings]

Possibly also:

246 1_ $i Former title in HTML header: $a Mapquest.com $f <Nov. 10, 1999>

Reactions?

Case Study Topic #4B

Discussion questions for Resource 4B:

- Look at the four selected iterations of this Web site home page represented on the following slides.

1. Knowing that this resource changes fairly radically every 4-8 years, how would this influence your original cataloging of the site as a whole? Think especially of what you would do, or not do, with the following:
   - 520 summary note
   - 505 formatted contents note
   - 6XX subject headings
   - 7XX personal and corporate name entries
2. Are there other cataloging issues you can think of that might arise from this type of Web site?

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The main point of Topic 4B is to think about how to originally catalog and/or update a bibliographic record for a resource that undergoes a complete overhaul with the change of every presidency. It becomes almost a new site, and we might even question whether or not it becomes a "new work" such that a new bib record should be created for each new presidency. But the title of the resource and its electronic address (URL) remain the same, so we would need to move to some kind of uniform title to distinguish the different "works" if we went in that direction.

It is suggested that it is better is to regard all as iterations of a single "work", and to make the description and subject headings as broad as possible to encompass changes. The focus should be on this Web site being the virtual presence on the Web of the White House, regardless of its current occupant, and of the current U.S. President, Vice President, etc.

The cataloger will want to take this into account when coming the 520 summary note, making clear that this is the way the site works. Since this site first began under the previous president the first catalogers of this site could not know exactly what would happen with it when a new presidency began.

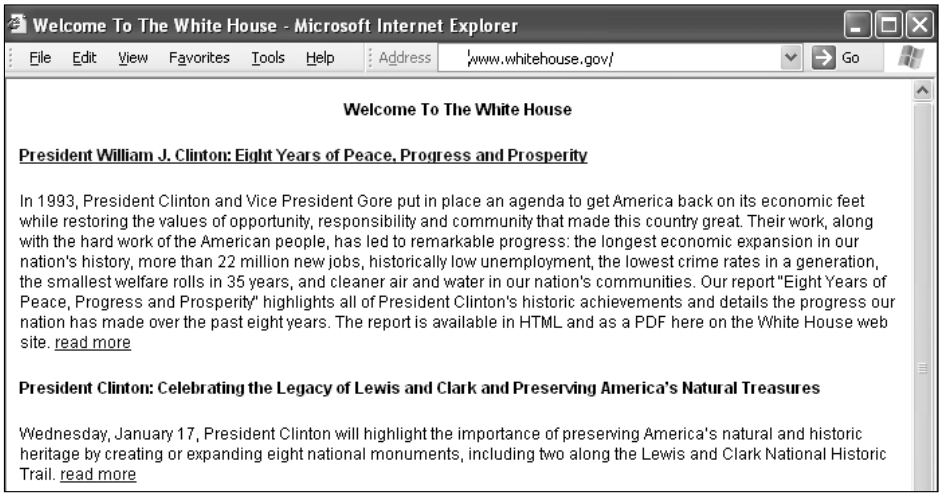
What do participants think about the wisdom of including a formal 505 contents note listing a "table of contents" of the current iteration of the site?

Would you want subject headings and names to be those of the current president, etc., or more general to encompass the US presidency in general?

Resource 4B, Dec. 1, 1998:

36

Resource 4B, Jan. 18, 2001:

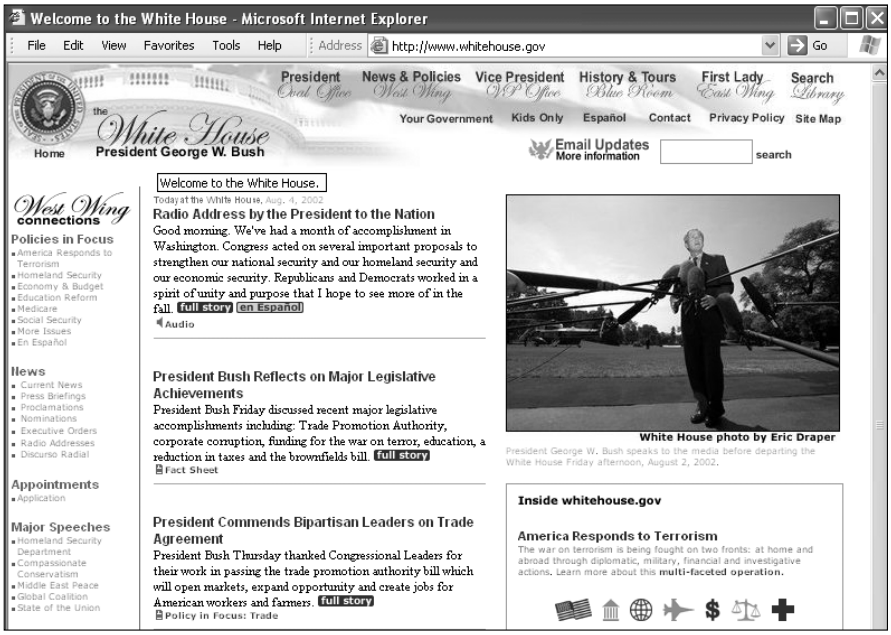


37

Resource 4B, Feb. 2, 2001:

38

Resource 4B, Aug. 4, 2002:



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Session 5:
Electronic Integrating Resources: Case Studies for Discussion
Special Issues and Challenges in Cataloging Electronic IRs

Case Study Topic #1: Choice of **Type of Record** ("Type" and OCLC workform) and **Type of Computer File** ("File") codes.

Discussion questions:

1. What is the best choice of *Type* and *File* codes for each of the following resources based on the screen print surrogates given? Use the lists of codes from appendix B along with the additional guidelines given below.
2. When is it difficult to determine whether a Web resource is primarily textual/language material or primarily computer-based?
3. What constitutes "significant audio or video" that makes a Web site cross the invisible line from being text/language material to some other type of material for coding purposes?
4. What constitutes an "online system or service"?
5. What constitutes "interactive multimedia"?
6. When is numeric data text-based and when computer-based?
7. When should File code "m" be used?
8. How should we code databases of images, maps, or sound files as opposed to text?

See Appendix B for the complete list of Type of Record (Leader/06 ; OCLC "Type") codes.

Additional Guidelines for the exercise:

Use Type "m" Electronic resource (Computer file) for:

1. Computer Software
- When the resource consists of computer software, including programs, games and fonts.

2. Numeric Data
- When the resource consists of numeric data such as census or survey data that resides in a database and that is manipulable by computer. [Numeric data presented solely in eye-readable, tabular form and that is not manipulable by computer is the equivalent of a text document and is cataloged as language material (Type "a")]

3. Computer-Oriented Multimedia
- When the resource consists of (1) the combination of two or more media, such as audio, video, images, animation, etc., and (2) no single aspect comprises the significant content.

4. Online System or Service
- When the resource constitutes an online system or service supports system-based user interaction. The presence of search software or of active hyper-links do not constitute computer programs and do not make resources online systems or services for cataloging purposes. In the area of online systems and services, consider whether the system itself (for example, a library system providing an interface to several databases), or the content of the several constituent databases, is being cataloged. When cataloging the system itself, use "Type" code "m" and "File" code "j".

  Examples of online systems or services include:
  - Online library systems (consisting of a variety of databases)
  - FTP sites
  - Electronic bulletin boards
  - Network information centers
  - Campus-wide information systems
  - Discussion groups or lists (via "listserv" or newsgroup)
  - News and weather reports with system-based user interaction
  - Airline reservation system
  - Online stock investment site

Use Type "a" Language Material for:

- World Wide Web Sites, when the content consists of primarily textual Web pages with incidental images, hypertext links, or search software: ACLU web site
- Collections or databases of textual electronic serials with search software
- Web portal pages consisting of textual links to other resources
- Online bibliographic databases such as library online catalogs
- Numeric data presented in tabular form not manipulable by computer

References:

- Guidelines for Coding Electronic Resources in Leader/06 (Library of Congress): http://lcweb.loc.gov/marc/ldr06guide.html
- Cataloging Electronic Resources: OCLC-MARC Coding Guidelines: http://www.oclc.org/connexion/documentation/type.htm

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Type of Computer File (Computer File 008/26 and 006/09 ; OCLC "File"):

Complete list of MARC Type of computer file codes:

a - Numeric data
b - Computer program
c - Representational
d - Document
e - Bibliographic data
f - Font
g - Game
h - Sound
i - Interactive multimedia
j - Online system or service
m - Combination
u - Unknown
z - Other
| - No attempt to code

Additional Guidelines:

- **d - Document**: Use this code when Type of Record is "a" and the resource consists of textual content, containing mostly alphabetic information (words or sentences) converted into a code that can be processed, sorted, and manipulated by machine, and then retrieved in many optional formats. Use for records containing full text of documents and language material intended to constitute a textual document, whether represented as ASCII or image data. Code d includes both single bibliographic entities or a collection of bibliographic entities. Documents whose primary purpose is textual, even if search software is present, are coded with code d.
- **e - Bibliographic data**: Use this code when Type of Record is "a" and the resource consists of data that are bibliographic citations. This includes library catalogs or citation databases. The data may be in a structured or unstructured form. Search software may be present, but the purpose of the record is description of the content of the bibliographic data or database, rather than description of the online system or service.
- **i - Interactive multimedia**: Use this code when Type of Record is "m" and the resource described by the record supports navigation through and manipulation of many kinds of media (audio, video, etc.) in which the user has a high level of control, often allowing an almost conversational interaction with the computer and the data.
- **j - Online system or service**: Use this code when Type of Record is "m" and the record describes an online system or service (that may or may not contain bibliographic information). An online system or service supports system-based user interaction. If the focus of the record is to describe the system itself, with the content of the databases incidental contained therein, it is coded j. If the resource is an online file where the system is incidental to the description, it falls into another category. Examples of online systems or services are: online library systems (consisting of a variety of databases), FTP sites, electronic bulletin boards, network information centers, or campus-wide information systems.
- **m - Combination**: Use this code when Type of Record is of any type, but most often "m," and the resource being described is a combination of two or more of the other types of files. Examples of combination resources include

computer models and numeric data files; computer programs and text files; and the like. When a World Wide Web site consists of significant audio and video, or of several types of data and the software to process the data, and/or if the cataloger is unable to determine predominance, use File code "m."

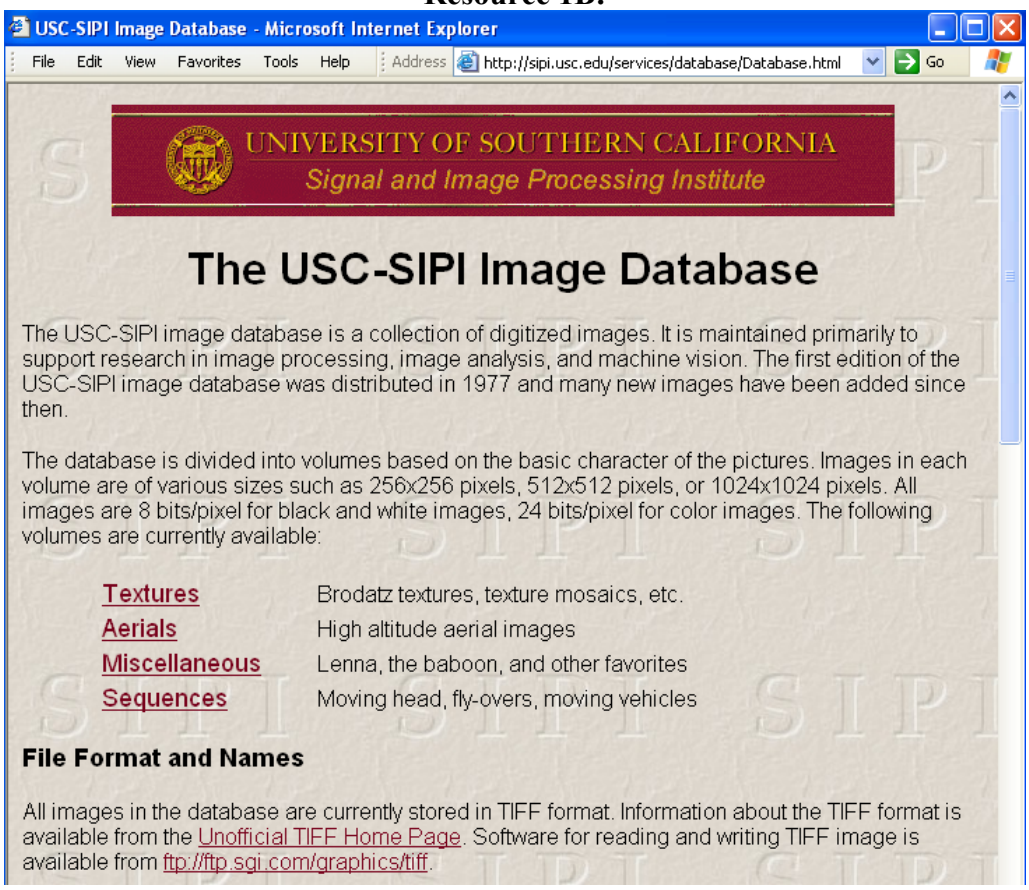
Extract from "Guidelines for Coding Electronic Resources in Leader/06" (Network Development and MARC Standards Office, Library of Congress): http://lcweb.loc.gov/marc/ldr06guide.html**:**

3. Examples of types of electronic resources

Example	Ldr/06	008/26	006/09
Online Bibliographic Database LC-Books file Medline	a		e
Collection of online databases MEDLARS LOCIS LC-MUMS	m	j	
Web-based computer software The universal currency converter	m	b	
CD-ROM of a census with manipulable numeric data (Mono or serial) 1996 National and state summary data tables () Common core of data (CCD)	m	a	
Electronic serial with search software MLA international bibliography	a		e
Collection of electronic serials with search software JSTOR Project Muse	a		d
Electronic journal American imago	a		d
CD-ROM of a census in textual form (mono or serial) County business patterns	a		d
Online system or service Internet Grateful Med Airline reservation system Online stock investment site	m	j	
Web site with significant audio and video CNN Web site	m	m	
Web "portal page" (Web page with collection of links) Tools for serials catalogers	a		d

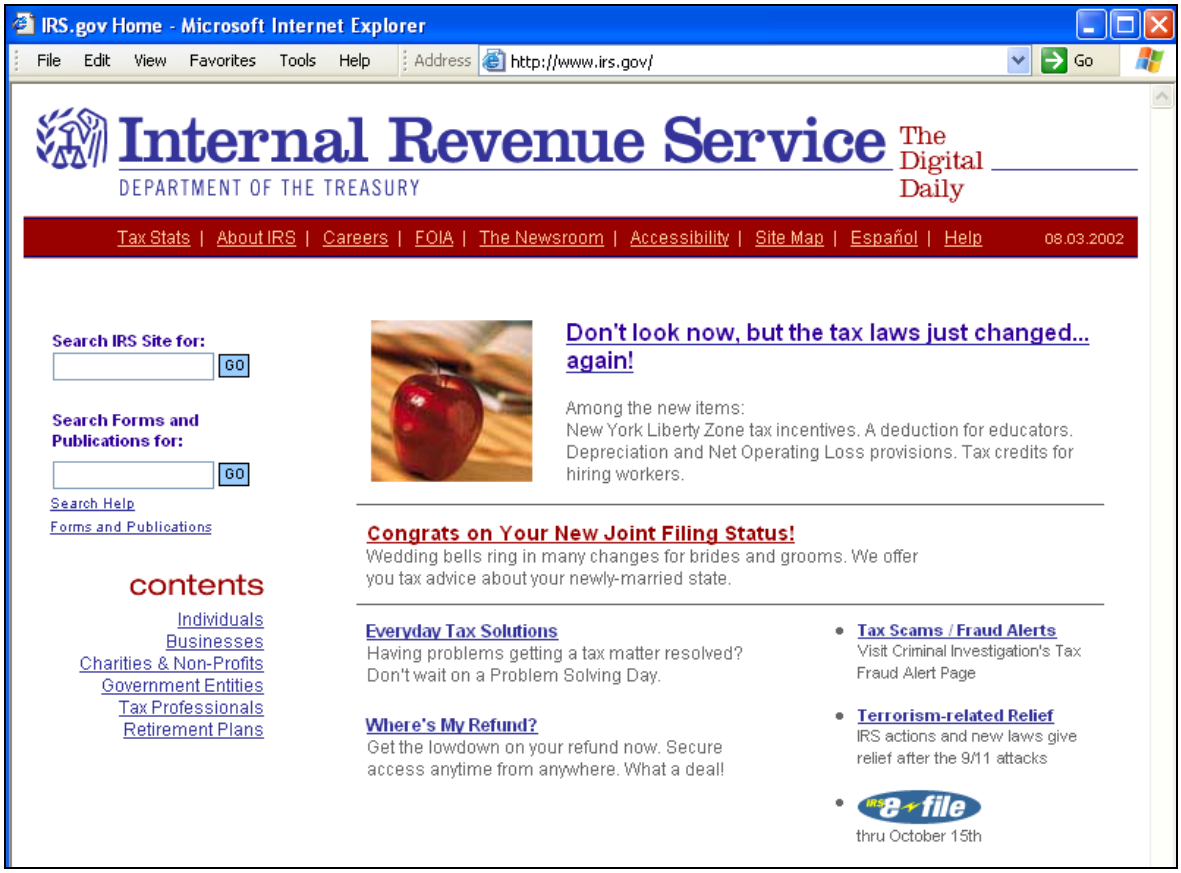
Resource 1A

Resource 1B:



Resource 1C:

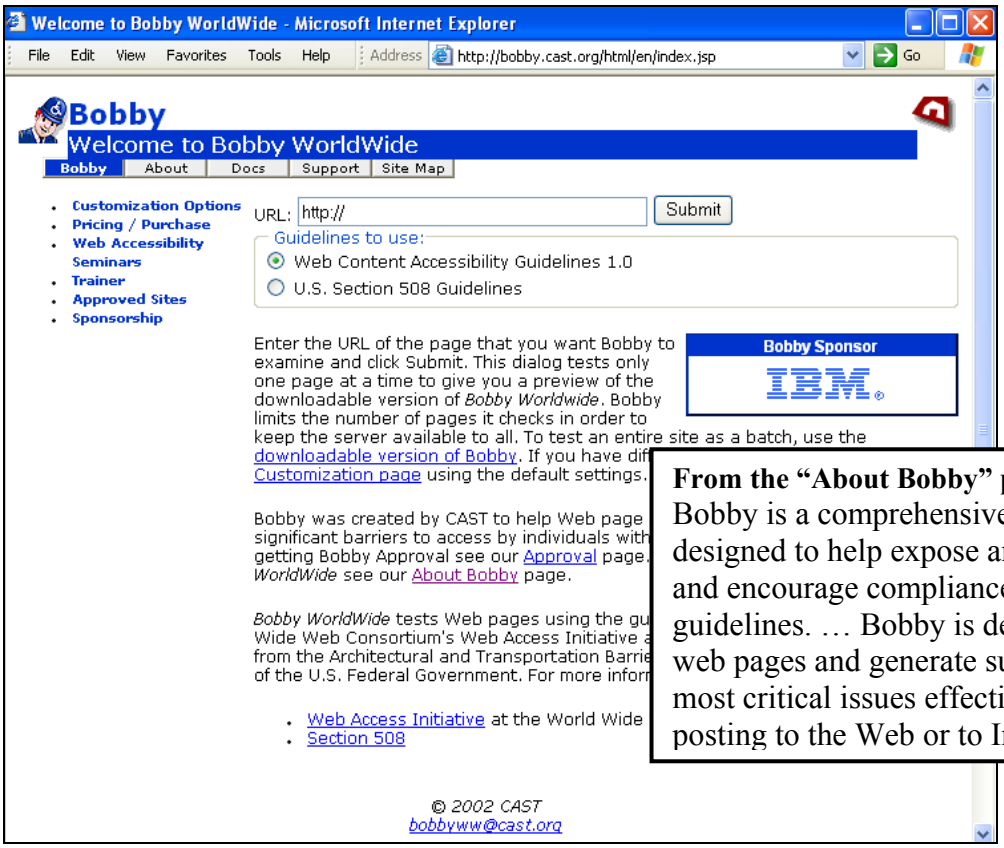
Resource 1D:



Resource 1E:

Resource 1F:

Resource 1G:



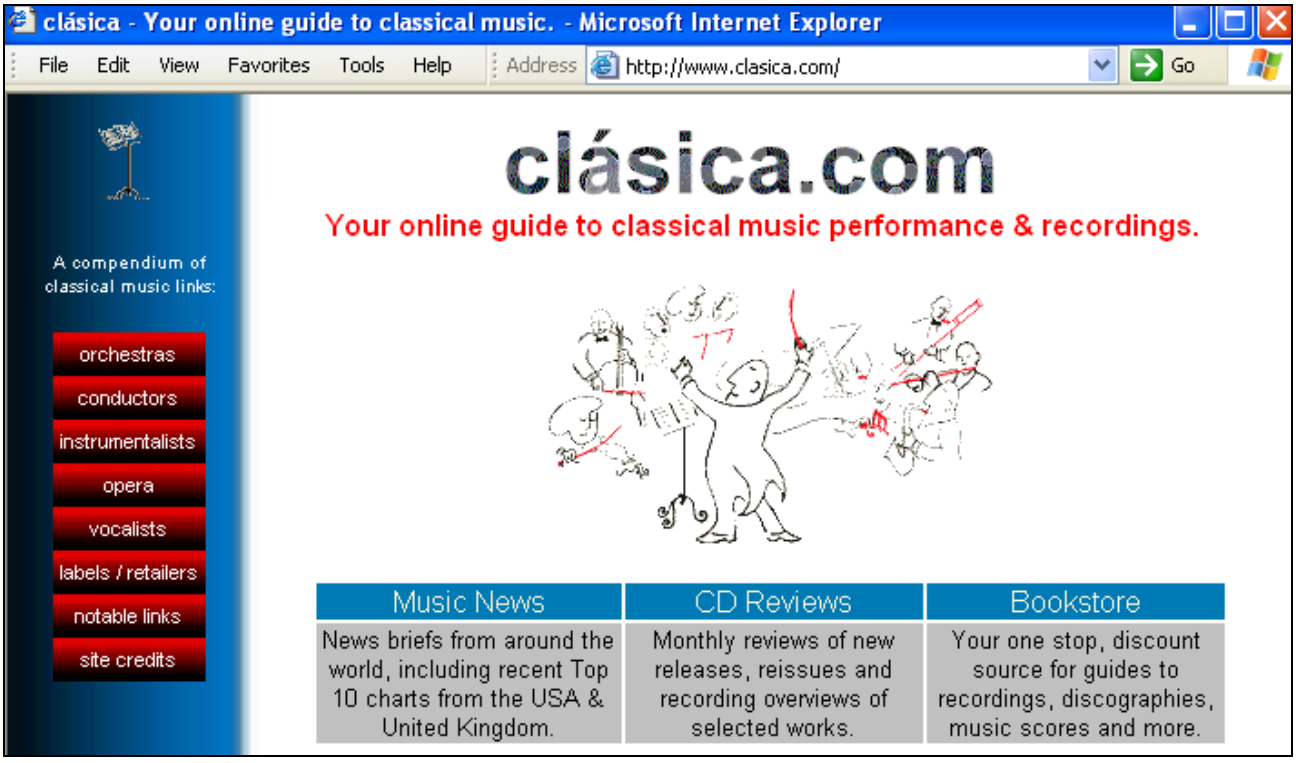
From the "About Bobby" page:
Bobby is a comprehensive web accessibility software tool designed to help expose and repair barriers to accessibility and encourage compliance with existing accessibility guidelines. … Bobby is designed for developers to test web pages and generate summary reports highlighting the most critical issues effecting site accessibility before posting to the Web or to Intranets.

Case Study Topic #2: Selecting chief source of information and transcribing title and statement of responsibility.

Discussion Questions:

1. What is the best choice for chief source of information and title proper for each of the resources below (2A-2E)?
2. What would you have in your bibliographic record for:
   - 245 title and statement of responsibility
   - 246 variant forms of title
   - 500 source of title note
3. Taking into account the changing nature of integrating resources, when might catalogers choose not to transcribe other title information after the title proper?
4. Are there cases in which an institution name that appears as a graphic or logo be transcribed as a statement of responsibility if not taken as title proper?

Resource 2A



Resource 2B

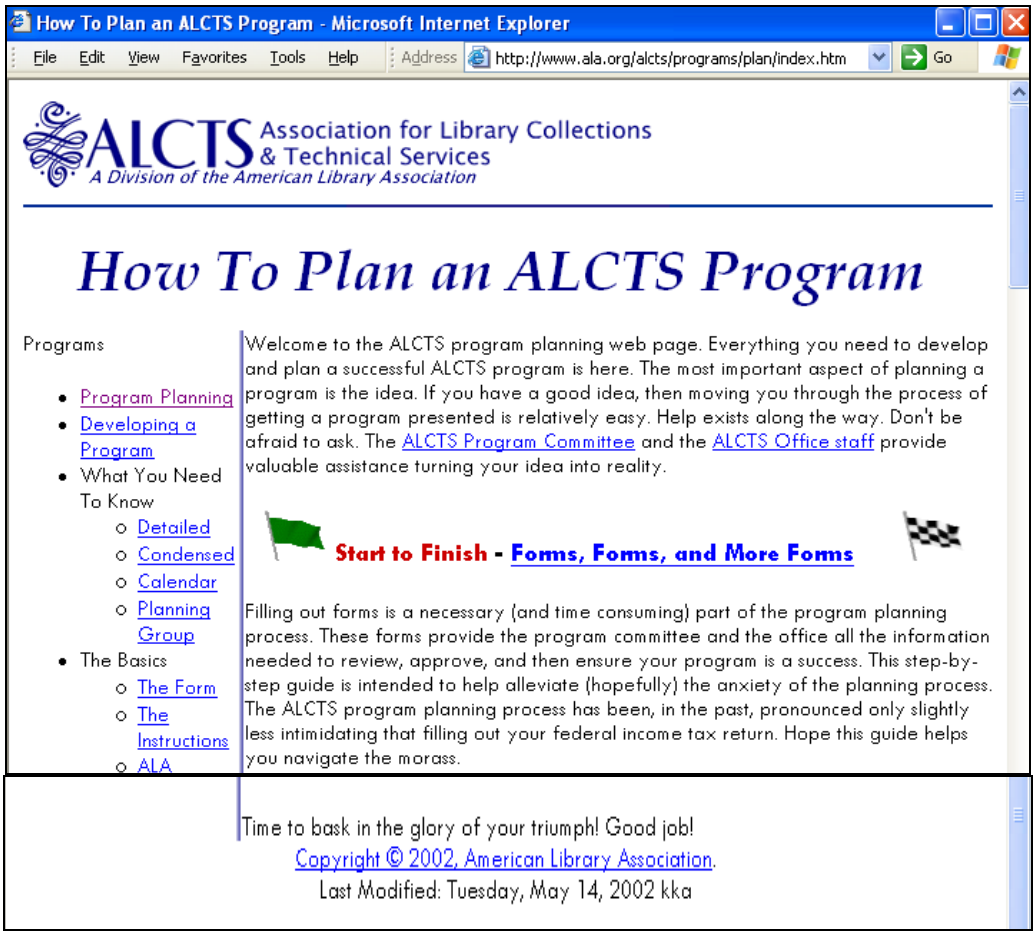
Resource 2C (screen shot 1)

(2C - screen shot 2) Hold cursor of "Welcome" (English) and you see this:

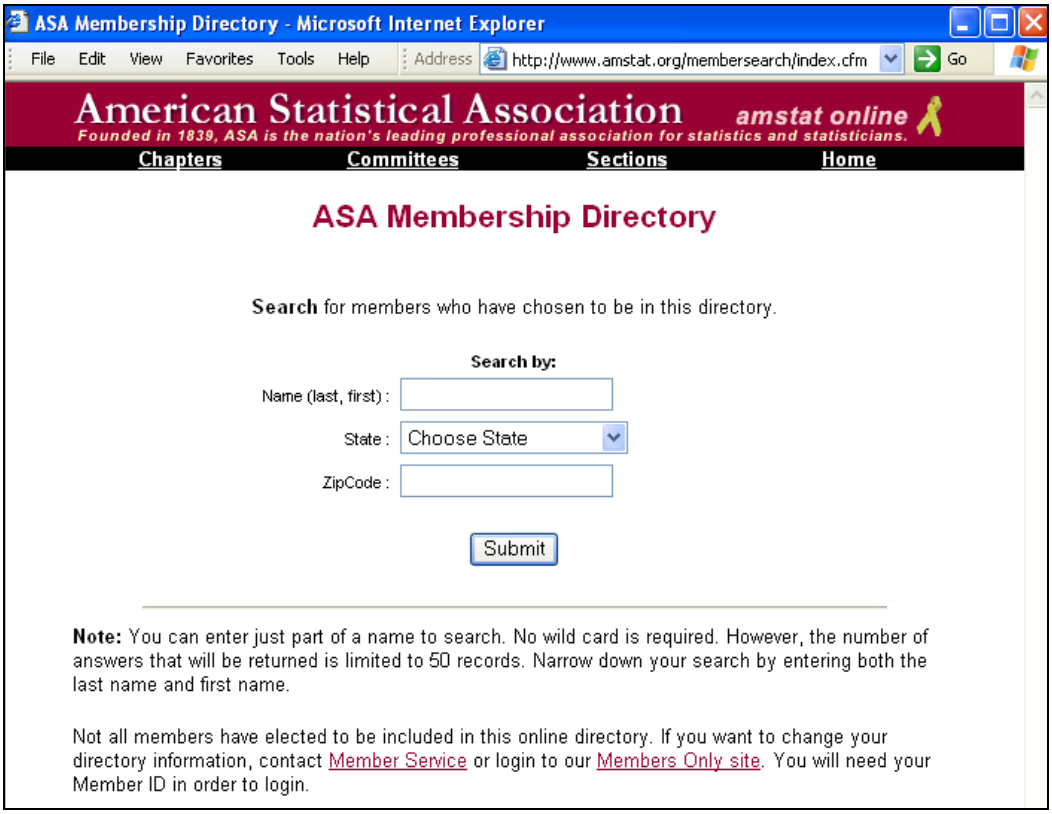
The title in the title screen appears only when the user holds their cursor over the word "Welcome"; parallel titles in the other languages appears when the cursor is held over the other greetings.

(2C - screen shot 32) Click on Welcome and you go to this page:

Resource 2D



Resource 2E:

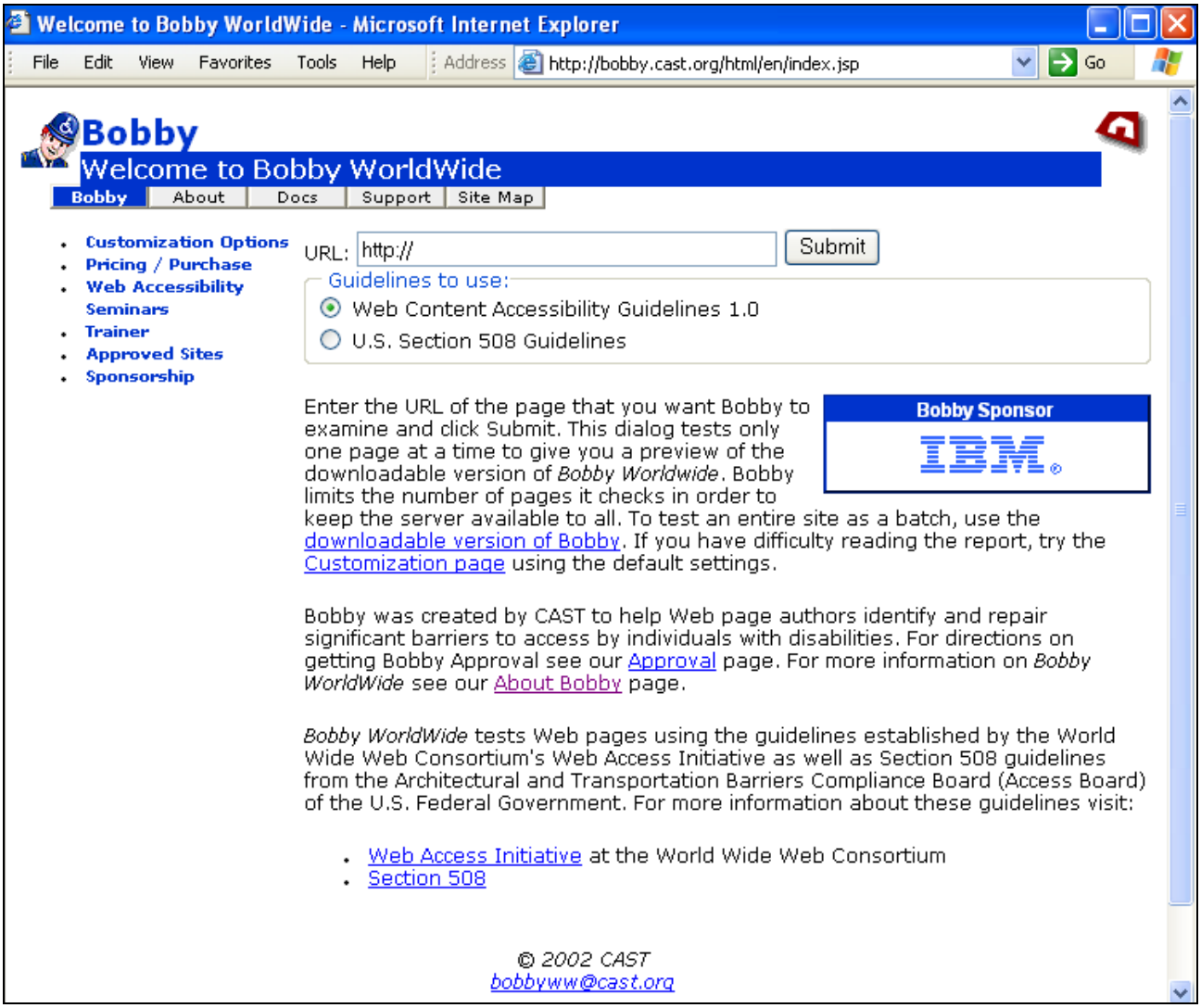

ASA Membership Directory - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Address http://www.amstat.org/membersearch/index.cfm
Go
American Statistical Association
amstat online
Founded in 1839, ASA is the nation's leading professional association for statistics and statisticians.
Chapters Committees Sections Home
ASA Membership Directory
Search for members who have chosen to be in this directory.
Search by:
Name (last, first) :
State : Choose State
ZipCode :
Submit
Note: You can enter just part of a name to search. No wild card is required. However, the number of answers that will be returned is limited to 50 records. Narrow down your search by entering both the last name and first name.
Not all members have elected to be included in this online directory. If you want to change your directory information, contact Member Service or login to our Members Only site. You will need your Member ID in order to login.

Case Study Topic #3: Ascertaining and recording publisher, place, and dates of publication.

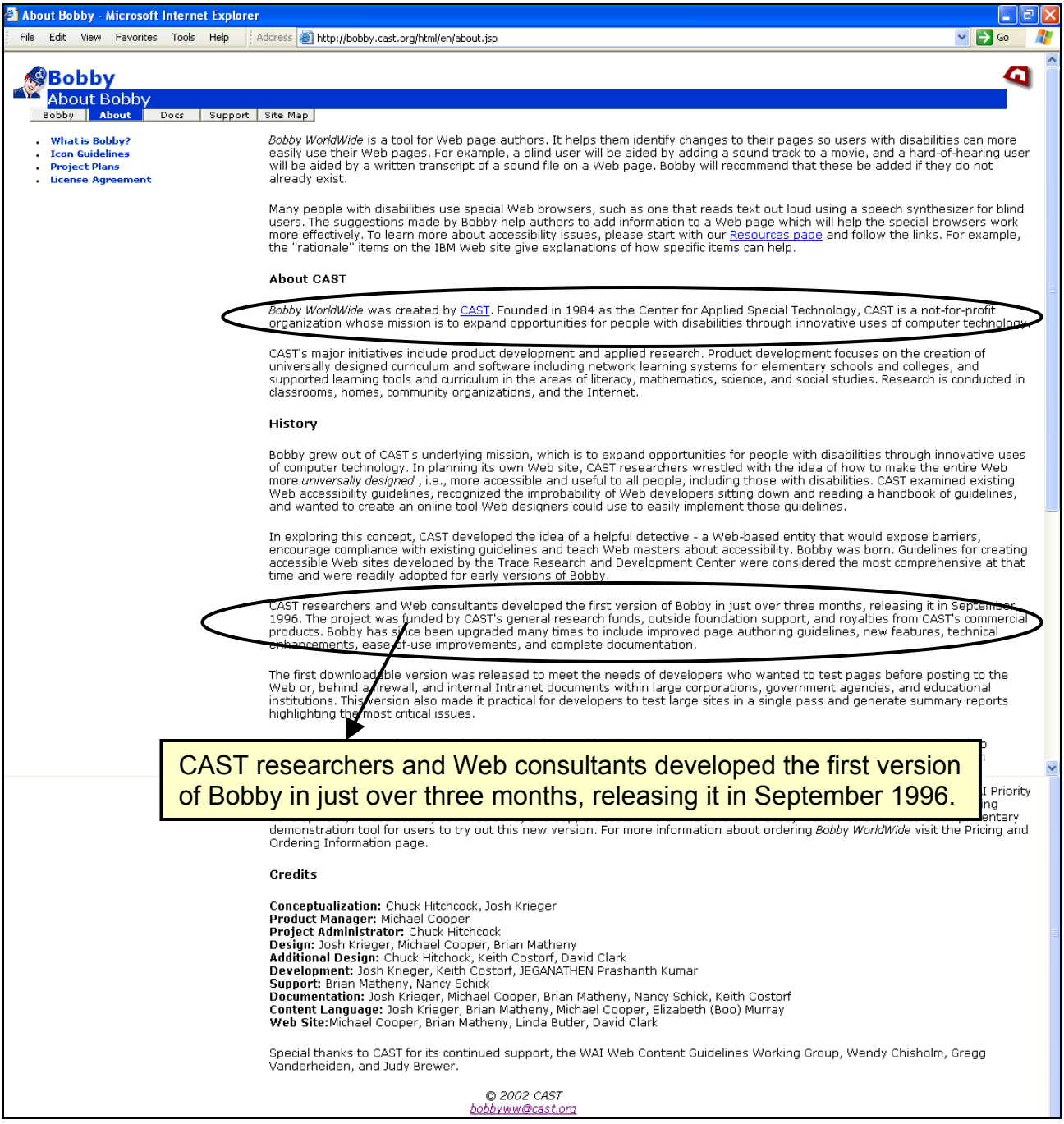
Discussion Questions:

1. What is the place of publication and publisher name for each of the following two resource (3A-B)?
2. What are the dates of publication of each?
3. What would you have in a MARC record for fields 260 and, if applicable, 362 1, for these resources?
4. Is "hosting" a web site the same thing as "publishing" it?

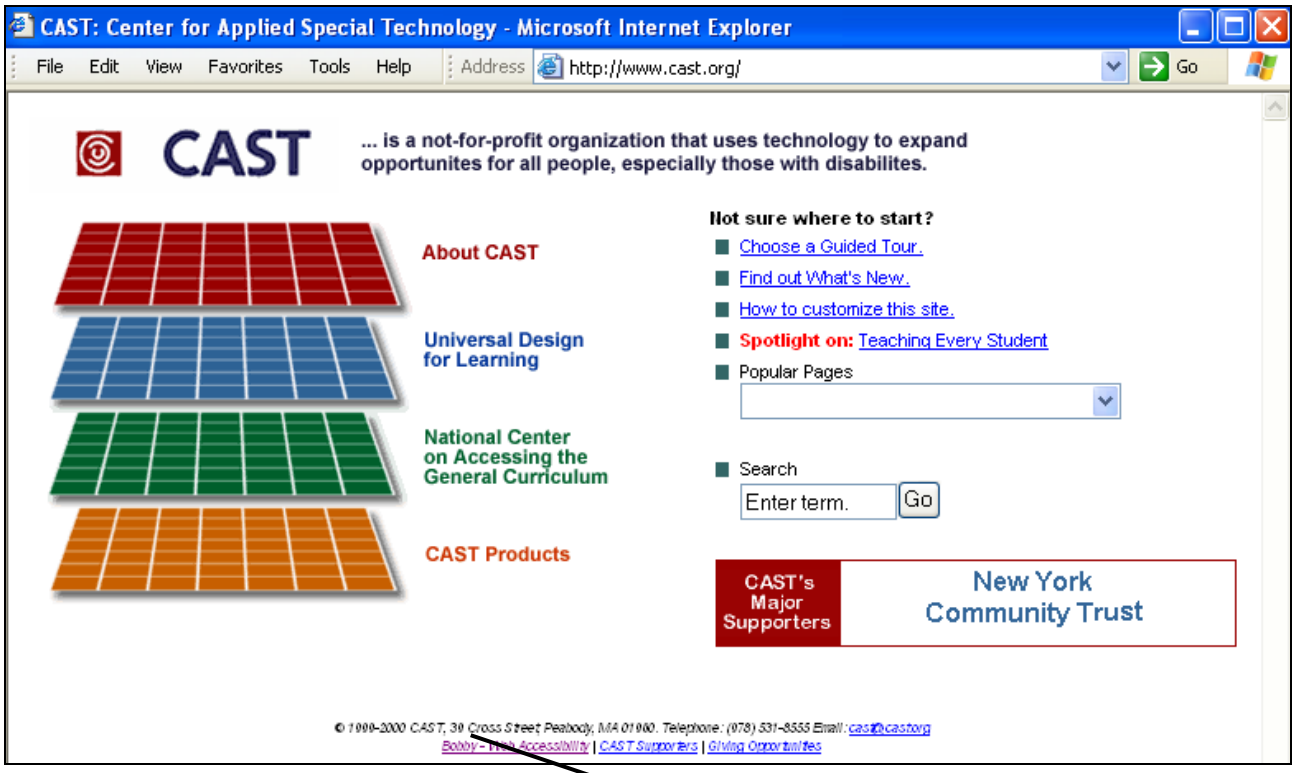
Resource 3A (screen shot 1)



Resource 3A (screen shot 2)



Resource 3A (screen shot 3)



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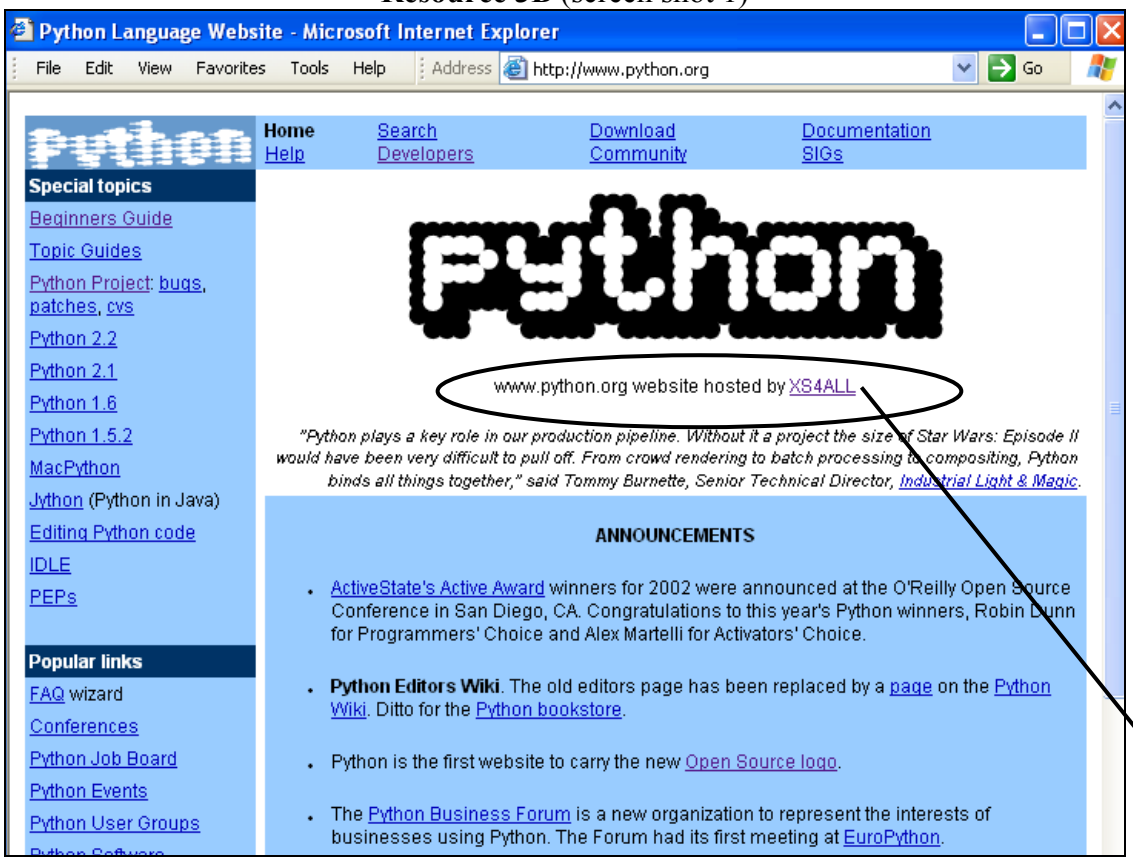
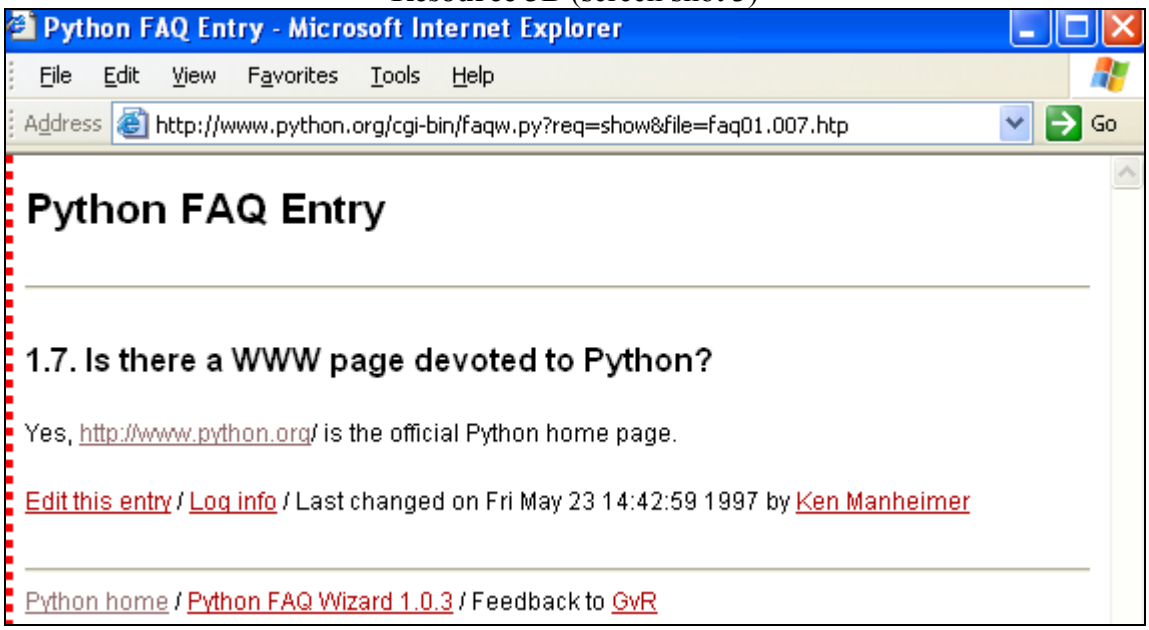
Resource 3B (screen shot 1)



[no further information appears at bottom of home page screen, FAQ, or other likely sources investigated]

Resource 3B (screen shot 2)

Resource 3B (screen shot 3)



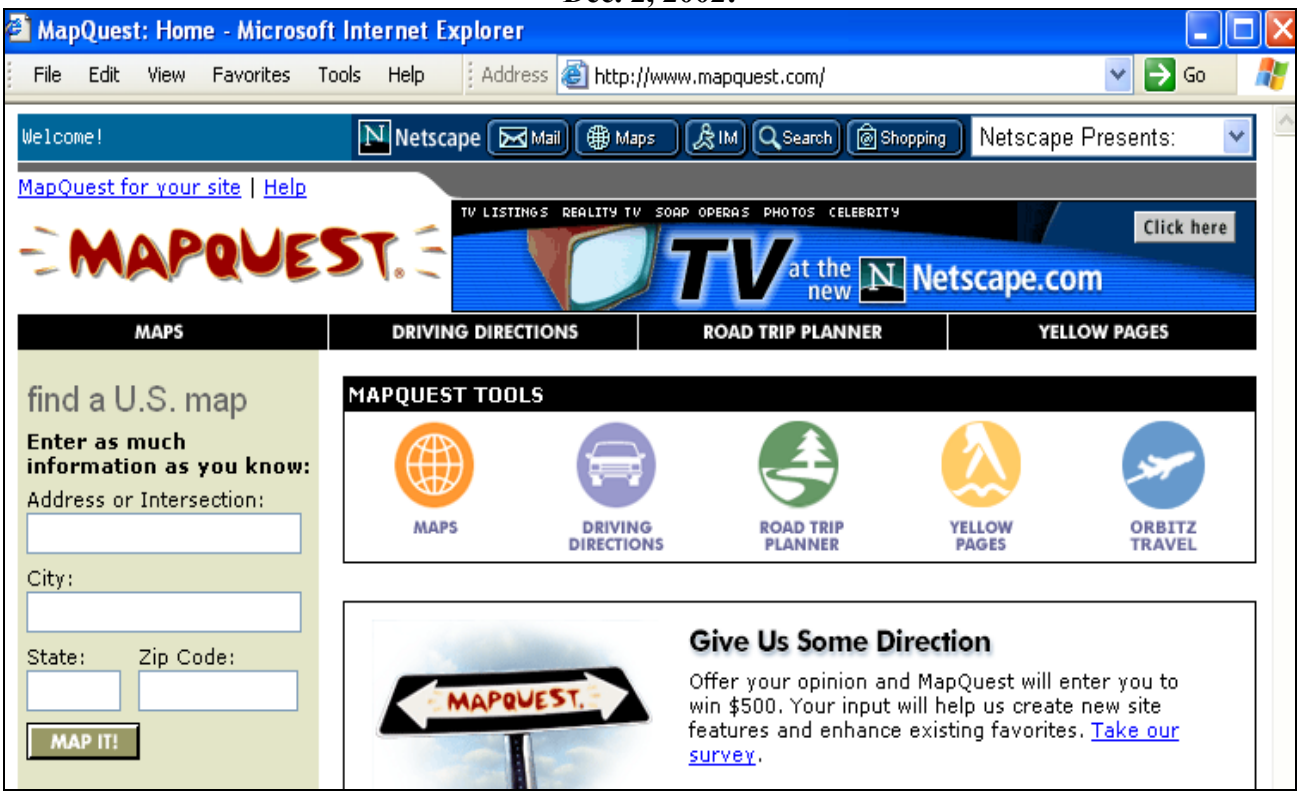
Case Study Topic #4: Creating and updating records for changing content.

Discussion Questions for Resource 4A (Mapquest):

1. How would you record the title proper and other title information for each iteration of the Mapquest Web site represented below?
2. Would knowing the frequency of changes for this title and other title information influence how you transcribe the title proper and especially other title information?
3. At what point might you use a 547 title complexity note instead of multiple 247s?

Resource 4A ("Mapquest" Web site):

Dec. 2, 2002:



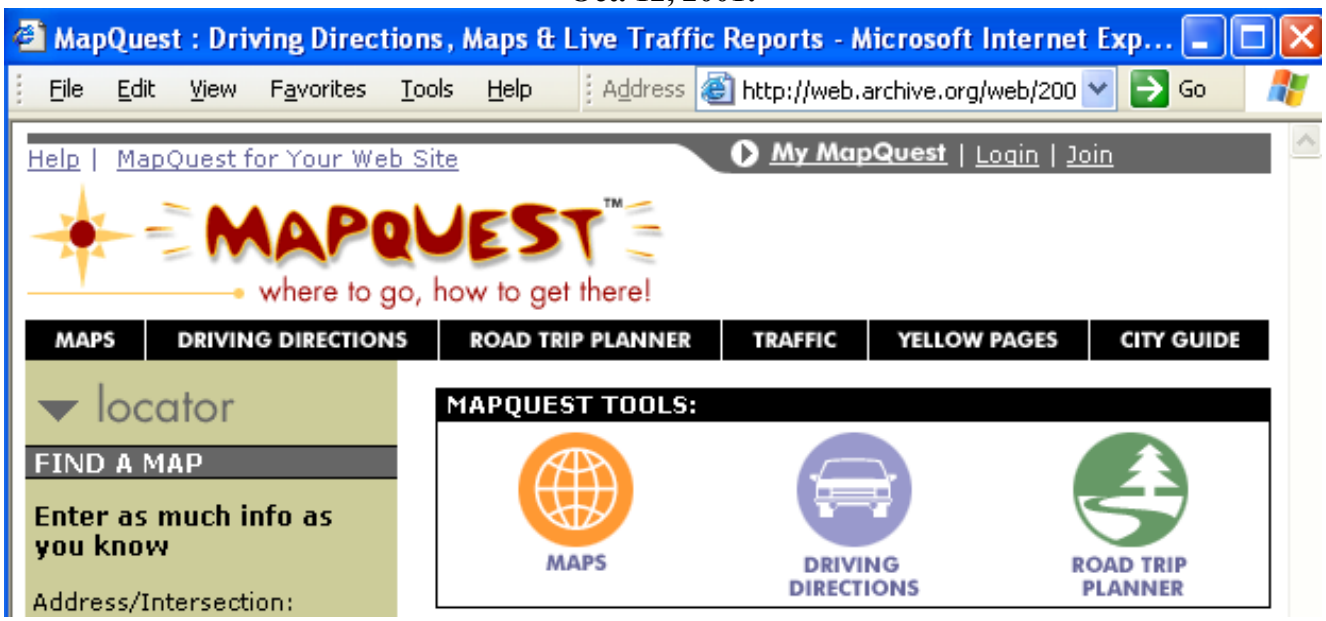
Jan. 11, 1998:

Nov. 10, 1999:

May 10, 2000:

Oct. 1, 2000:

Oct. 12, 2001:



Discussion questions for Resource 4B (White House):

- Look at the four selected iterations of this Web site home page represented below.

1. Knowing that this resource changes fairly radically every 4-8 years, how would this influence your original cataloging of the site as a whole? Think especially of what you would do, or not do, with the following:
   - 520 summary note
   - 505 formatted contents note
   - 6XX subject headings
   - 7xx personal and corporate name entries
2. Are there other cataloging issues you can think of that might arise from this type of Web site?

Resource 4B: Dec. 1, 1998: